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Solicitation Training

Periscope

Overview

Overview – What's a Bid?

Bid documents enable users in eMaryland Marketplace to conduct solicitations. Users complete solicitations by:

1. Creating the Bid document,
2. Defining the solicitation type, process and schedule,
3. Establishing the line item(s) that can be bid upon,
4. Attaching the necessary documentation,
5. Selecting the vendors to notify,
6. Submitting the solicitation for approval,
7. Posting the solicitation,
8. Opening and reviewing the solicitation responses,
9. Recommending award(s) for approval, and
10. Posting approved awards.

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Bid documents in eMaryland Marketplace allow Basic Purchasing users to conduct all types of solicitations for products and services, including Invitations for Bid (IFB), Requests for Information (RFI), Requests for Proposal (RFP), Requests for Quote (RFQ), etc.

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Overview – Bid Documents

Document Type	Purpose	Created By
Bid	• Conduct solicitations • Create and publish solicitation amendments • Close response period • Access the **Bid Tabulation (Bid Tab)** document	• Basic Purchasing (procurement officer)
Amendment	• Create and apply solicitation amendments or addendums	• Basic Purchasing
Bid Tab (automatically created by closing response period)	• View and evaluate solicitation responses • Request clarifications and revisions to responses • Recommend responses for award • Post awards • Create contracts	• Basic Purchasing
Quote	• Respond to a solicitation	• Seller (vendor)

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During the course of a solicitation, a series of documents will be created in eMaryland Marketplace. The table displays the various solicitation documents that can be created and describes who can create them and what functions they support.

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Overview – Bid Types

Bid Types	Description
Open	Open Bids are those that allow any registered vendor in eMaryland Marketplace to submit a response. Open Bids are also viewable to users without a login ID from the Login Screen using the **Open Bids** link.
Closed	Closed Bids are visible only to those vendors originally notified of the Bid upon publication. Only these vendors will be able to submit a response through the system.

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eMaryland Marketplace does not differentiate between solicitation methods, meaning that the Bid document does not operate differently based on what type of solicitation you are conducting. Instead, you must make clear through the items you add, external documents you attach and other settings you specify what type of response you expect from bidders.

However, eMaryland Marketplace does allow you to configure certain behavior on each Bid by selecting a **Bid Type**. The table describes each available Bid Type.

Overview – Bid Statuses

Status Code	Status Name	Description
2BI	In Progress	The document is still being completed by the originator. It is still editable by the originator and any Basic Purchaser supervisor with rights over them.
2BRA	Ready for Approval	The document has been submitted and travelling down the approval path. The originator and approvers can edit only the Bidders and Attachments at this status.
2BRT	Returned	The document was returned to the originator by an approver prior to being published. The Bid can be "Re-Opened" to "In Progress" status, edited and re-routed for approval by the originator.
2BR	Ready to Send	The document has been approved and is awaiting the originator to send notification about the Bid to selected vendors and post on the eMaryland Marketplace login screen (if desired). The document can only be edited via an Amendment.
2BS	Sent	Notification regarding the Bid has been sent to selected vendors and posted on the eMaryland Marketplace login screen (if desired). Vendors are now able to submit electronic responses if enabled. The document can only be edited via an Amendment.
	Ready to Open	The Bid has reached its configured Opening date and time. Vendors can no longer submit electronic responses if enabled. The document can only be edited via an Amendment.
2BO	Opened	The vendor responses to the Bid can now be viewed or entered by the originator and any BP supervisor over them. The revision / evaluation process can occur on the Bid Tab at this status.
2BE	Evaluated	All Bid items have been recommended for award by the Basic Purchaser and are now awaiting approval.
2BA	Approved	The award recommendation of all Bid items has been approved. These items are now waiting for the Basic Purchaser to convert them into one or more Purchase Orders.
2BPO	Bid to PO	All Bid items have been awarded and transferred to a Purchase Order. The award(s) are posted on the eMaryland Marketplace login screen.
2BC	Cancelled	The Bid has been cancelled by the originator or an approver.

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As Bids are processed, their status changes in order to allow/disallow various functions associated with the document. The table displays each possible status of a Bid and what functions each status supports.

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Step 1

Creating the Bid document

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Step 1 – Checklist

- ☐ Login to eMaryland Marketplace
- ☐ Confirm your role
- ☐ Create a new Bid document

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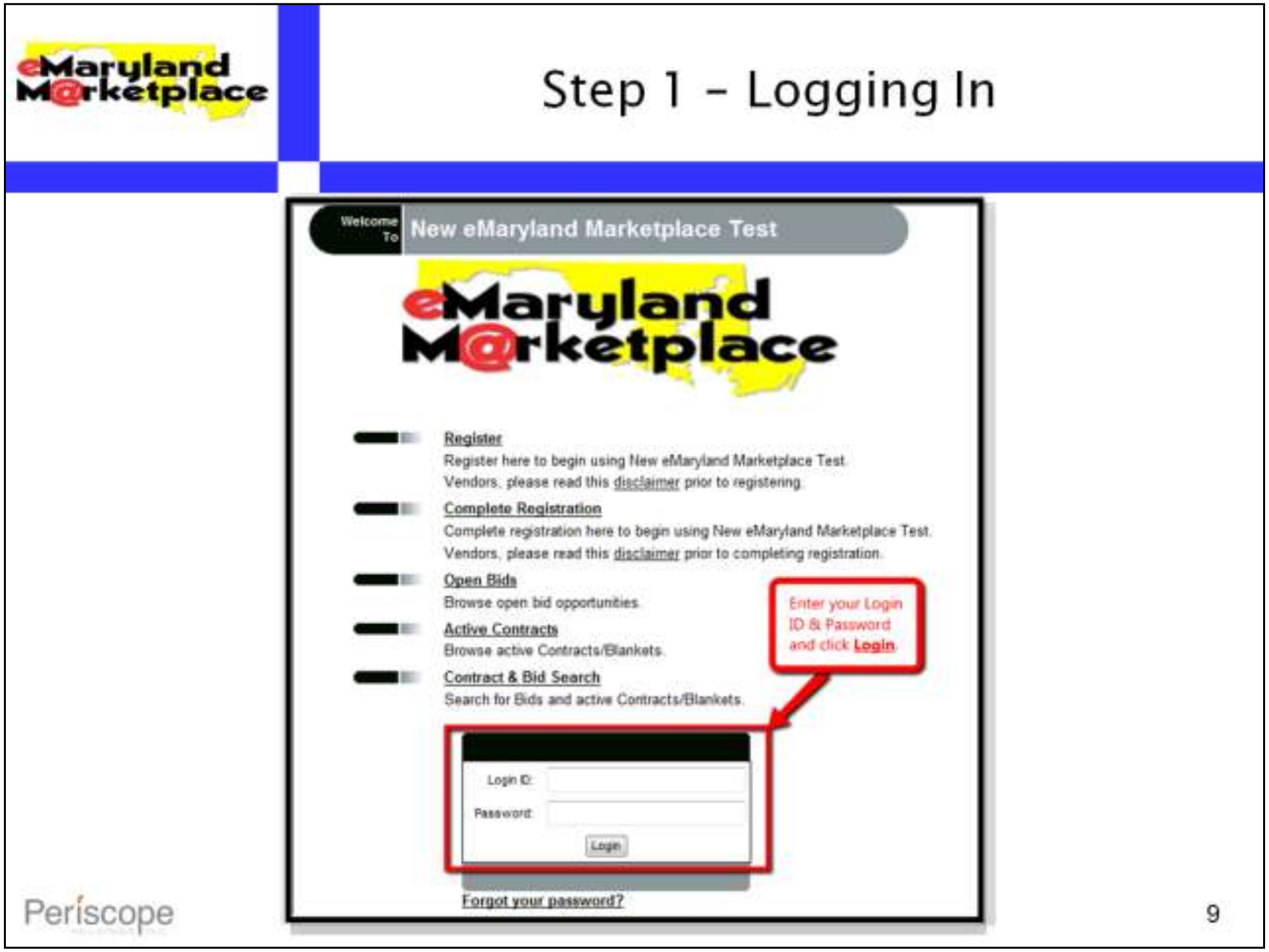
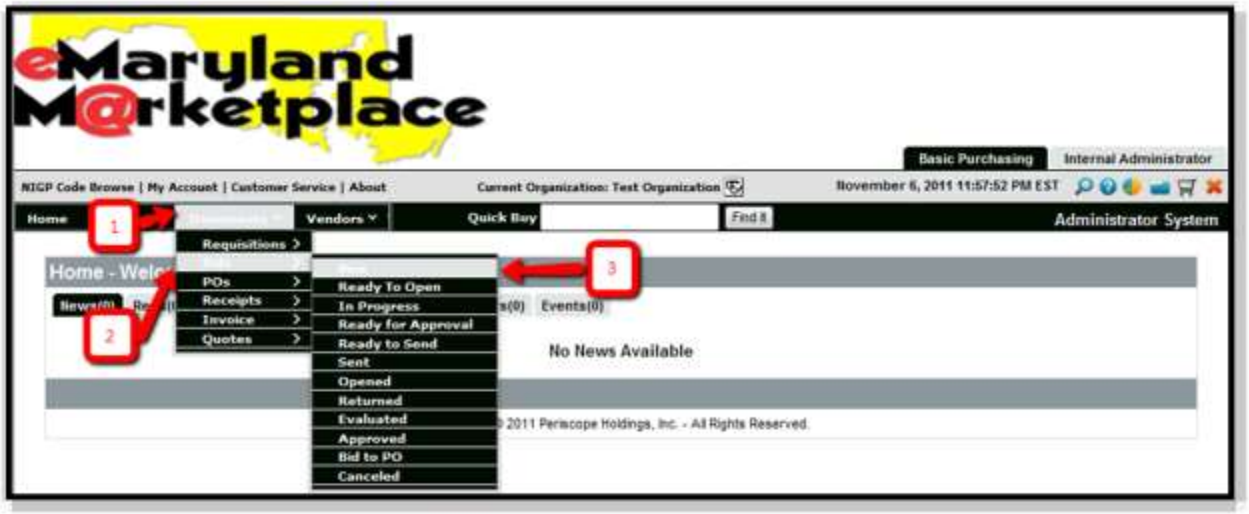


Before you can create a new document, you must login to eMaryland Marketplace. To login to eMaryland Marketplace, input your Login ID into the "Login ID" field and the password you were given by an administrator into the **Password** field. Next, either hit **Enter** on your keyboard or click the **Login** button. Note that neither your login ID or password is case sensitive.

The initial password you receive is temporary. The first time you login, you'll be asked to reset your password to something that only you know. Keep your password private, as your login ID and password constitute your electronic signature within eMaryland Marketplace. If you have forgotten your password, select the "Forgot your Password" link and the system will walk you through getting a new password emailed to you.

Once logged in, if you have access to multiple roles, ensure that the Basic Purchasing role is currently selected in order to enable the creation of a new Bid. Note that if you do NOT have access to multiple roles, you will not see any role tabs along the top and you can proceed.

Step 1 – Creating a New Bid



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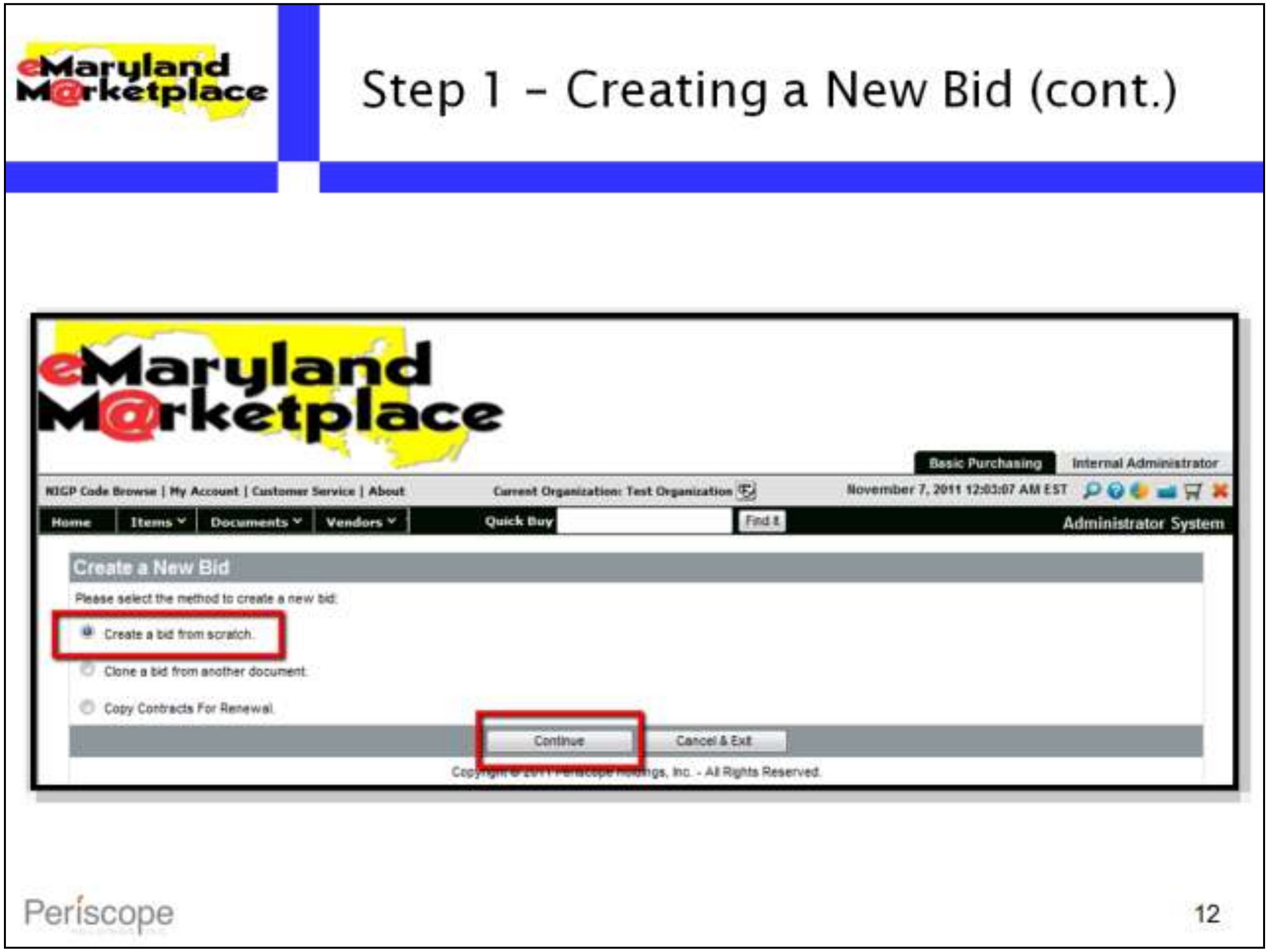
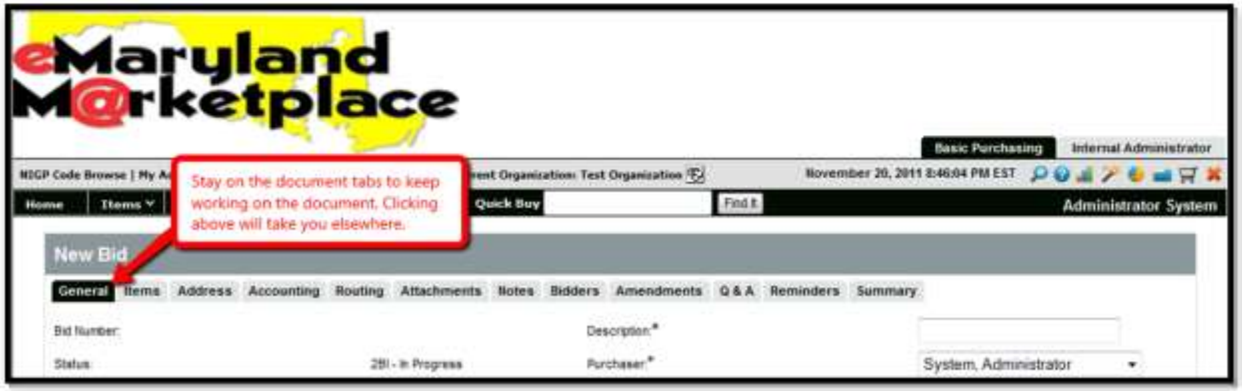
To create a new Bid from scratch, use the Documents dropdown in the Navigation tool bar, hover over Bids and select **New**.



The **Create a New Bid** screen displays. Next, click the radio button next to **Create a bid from scratch** and select **Continue**.

Step 1 – Creating a New Bid (cont.)



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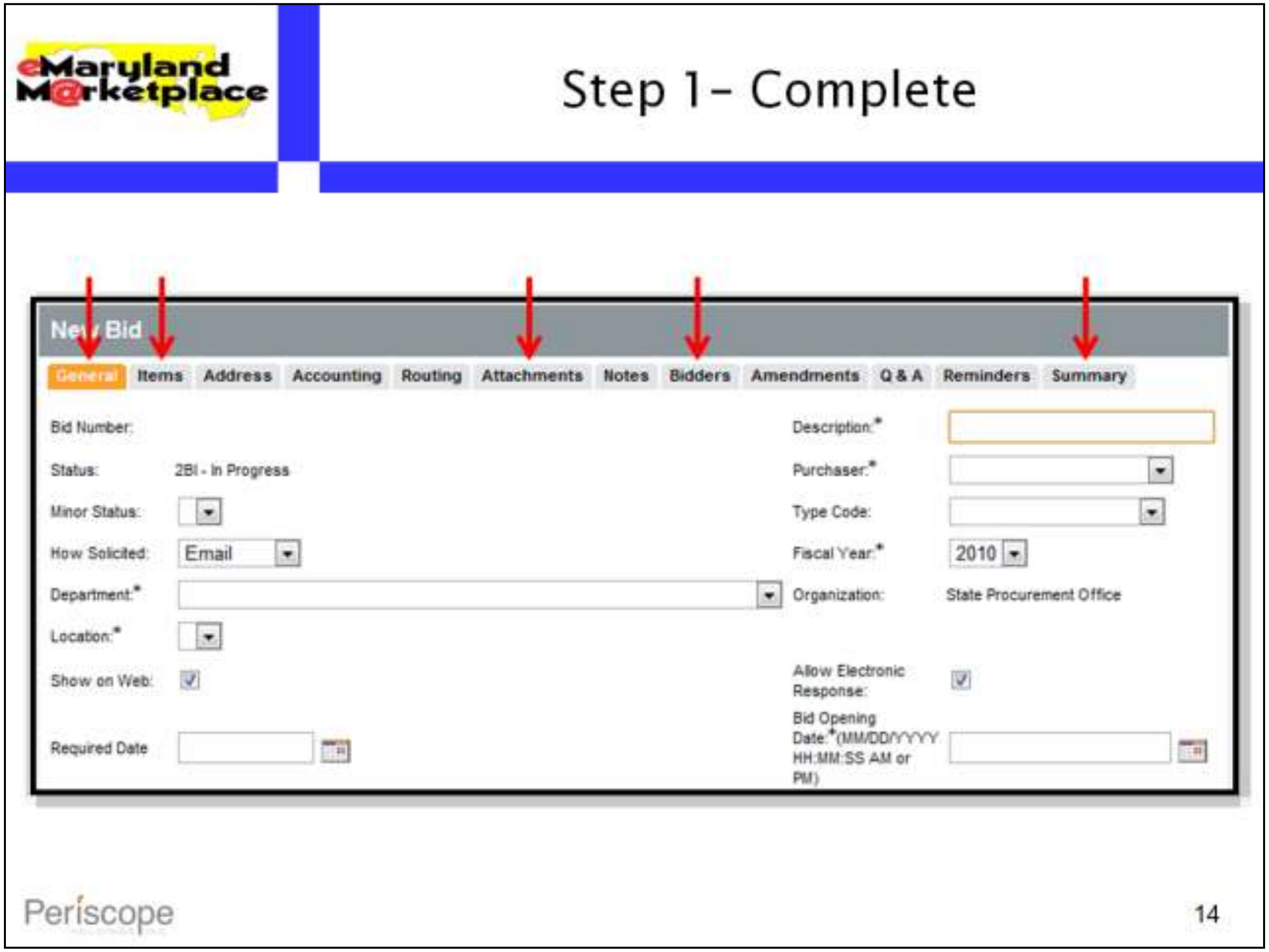
The General tab of your blank new Bid document will display.

New documents are not immediately assigned a number, meaning that they are not established documents that permit you to leave and access them later yet. In order to have a number assigned and be able to access the document later, you must first complete the required fields on the General tab and save. The next step will walk you through this process.



Step 1 is complete once you have created your new Bid document and have been taken to the General tab on the far left side of the document. The process for completing any document in eMaryland Marketplace is to work through the tabs along the top of the document, completing all required fields, then reviewing and submitting the document for approval via the Summary tab on the far right.

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Step 2

Defining the solicitation type, process & schedule

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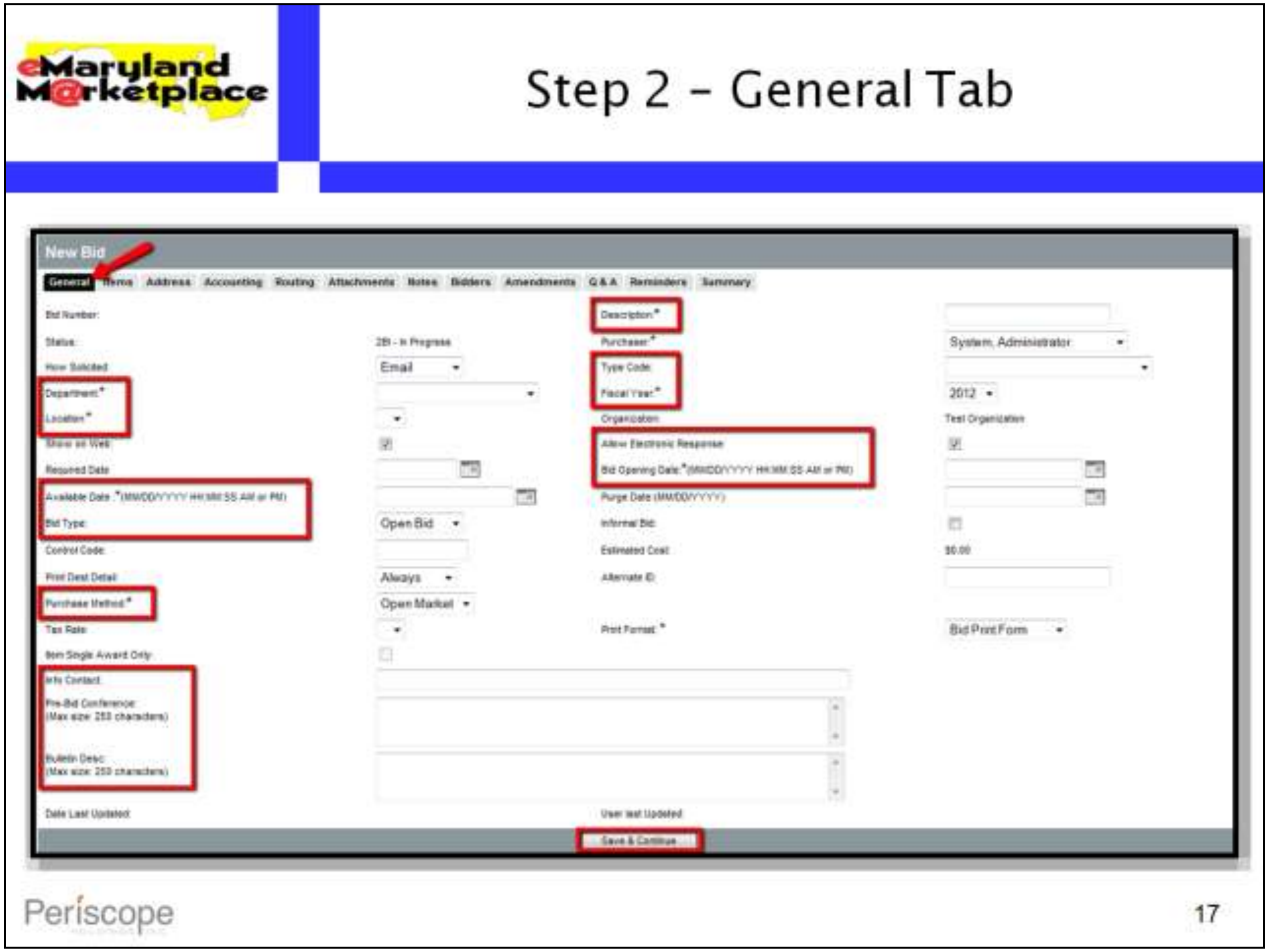
Step 2 – Checklist

- ☐ Complete the General tab
- ☐ Click Save & Continue



The General tab of the Bid document is where you describe the solicitation, input the important dates regarding the solicitation and determine how the solicitation will be conducted. For Bids created from scratch, you must complete this tab and click **Save & Continue** before being able to select the other tabs to complete the Bid document.

The circled fields are the ones that need to be completed. **All others should be ignored.**

Step 2 – General Tab Field Descriptions

Field	Description
Description*	Title of the solicitation.
Type Code	Type of solicitation that is being conducted.
Fiscal Year	Fiscal year that this solicitation is being conducted in.
Department / Location	Department & Location that the solicitation is being conducted on behalf of.
Allow Electronic Response	When checked, vendors can respond to this solicitation online (does not prohibit offline response). When unchecked, vendors must respond offline.
Bid Opening Date*	Due date and time for vendor responses to the solicitation. No responses can be submitted after this date.
Available Date*	Date and time that vendors will be able to view the solicitation online and respond (select a time in the past to have the solicitation be immediately published after sending).
Bid Type*	"Open" bids allow any vendor to view and respond to the solicitation. "Closed" bids allow only selected vendors to view and respond to the solicitation.
Purchase Method*	Leave at "Open Market" unless a term contract will be awarded and the begin and end dates are known or can be estimated. If so, pick "Blanket."
Info Contact	Contact information shared with vendors regarding the solicitation.
Pre-Bid Conference	Information regarding the Pre-Bid Conference, if applicable.
Bulletin Description	Longer description of the solicitation.

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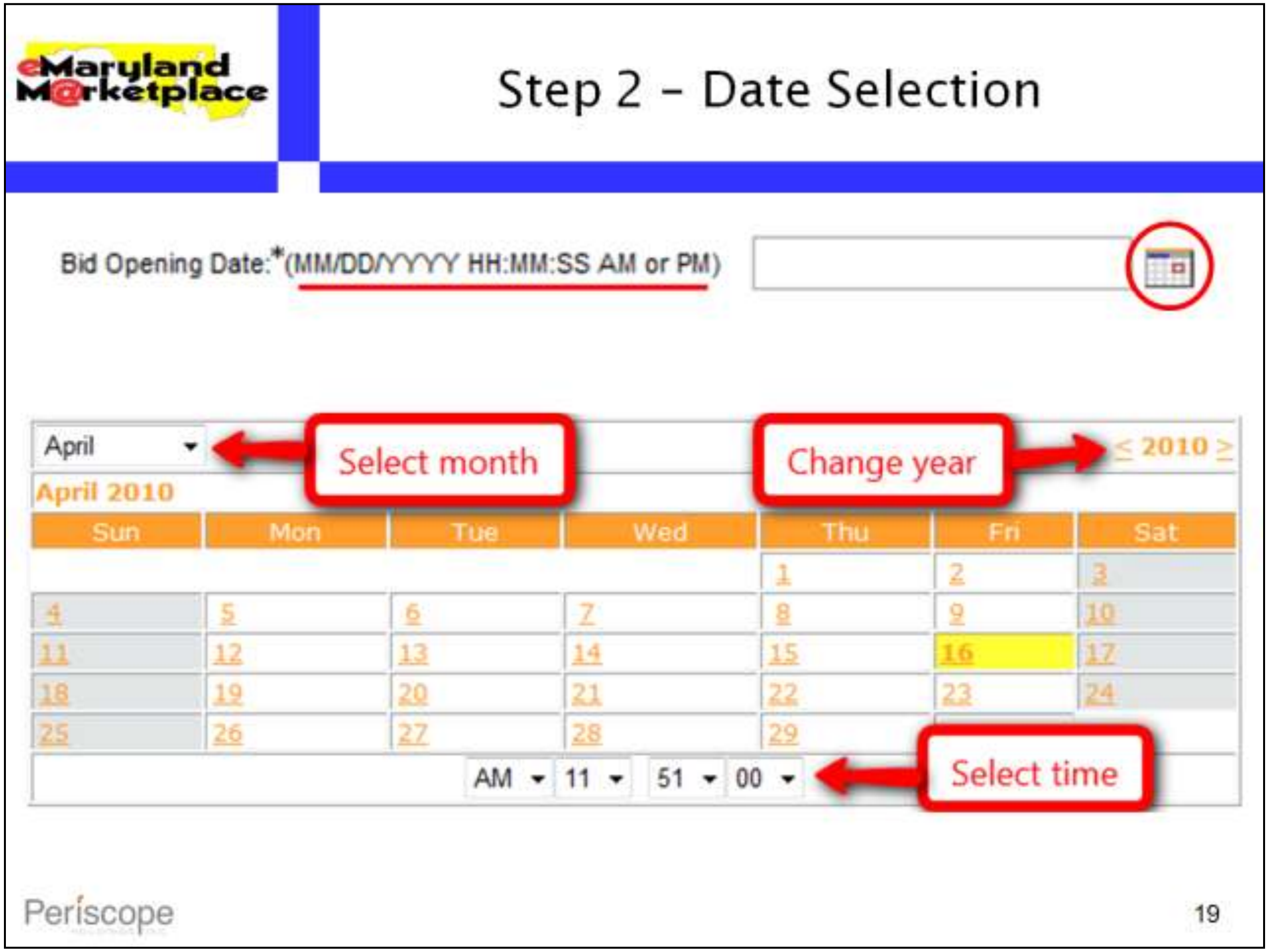
The standard fields on the General tab govern vendor access and response to the solicitation and the schedule of the solicitation. The table describes each of the primary standard fields you're likely to use each time you create a Bid. Fields with an asterisk are required.

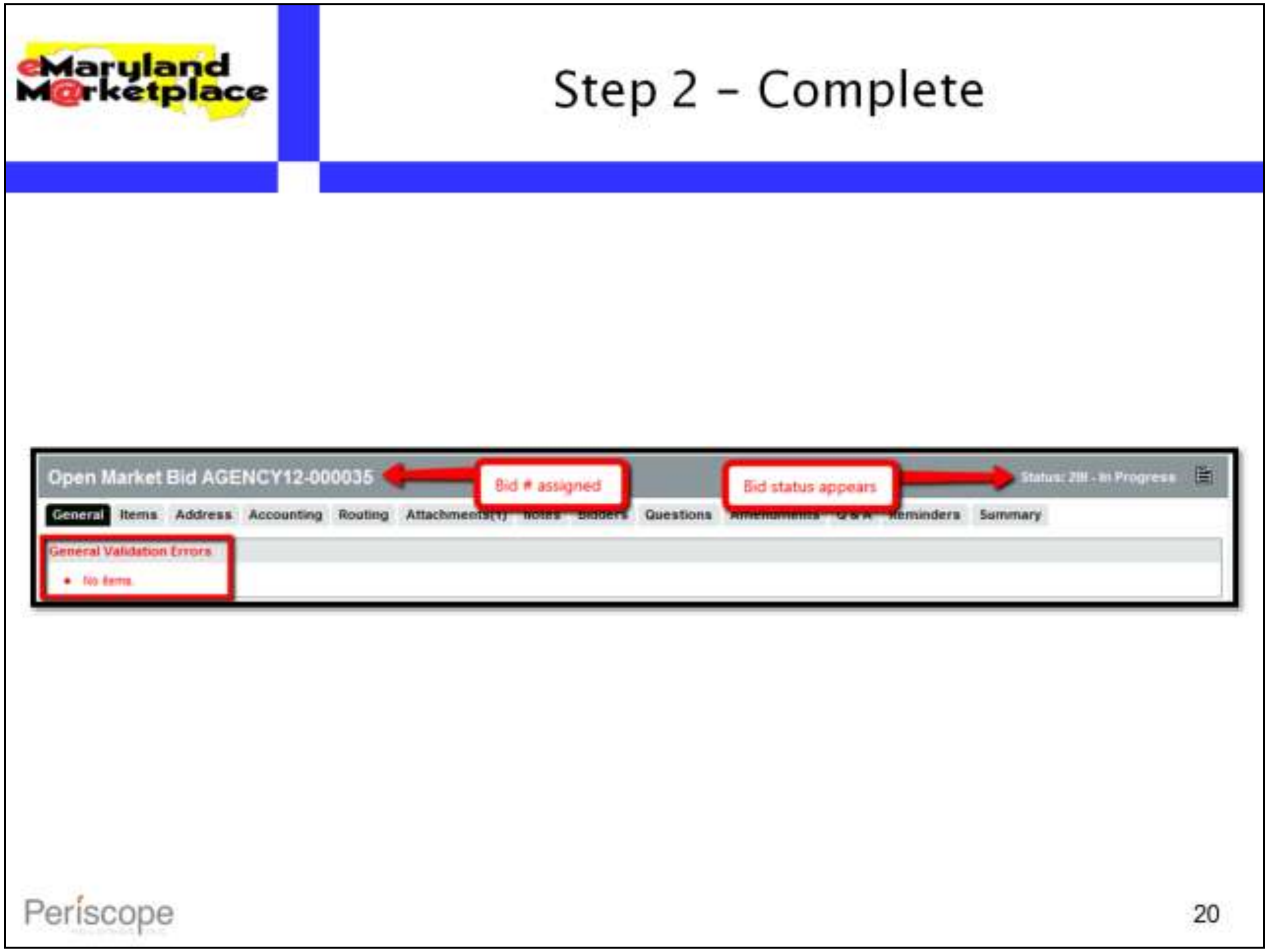
Note that the **Pre-Bid Conference** field displays from the **Open Bids** link on the Login screen.



Two of the fields you must complete on the General tab of Bids require that you input a date and time. Dates can be entered in one of two ways. The first is by clicking the calendar icon next to the field. This will display a pop-up window featuring a calendar with dropdown fields to select a time. Once you select a date in the calendar, the pop-up window will close and the date selected will appear in the field. Therefore, if a specific time is desired, **you must select the time before clicking on the date.**

The second method for entering a date and time is simply to type it into the field. In order for the system to acknowledge what you have entered however, it must match the format included in parentheses next to the name of the field - (MM/DD/YYYY HH:MM:SS AM or PM).

Note that when selecting the **Bid Opening Date**, the system cuts off vendors' ability to submit a Quote at the exact time selected. Therefore, in order to allow vendors to submit their Quote at 3:00pm, you must enter a time of 3:01pm.



Step 2 is complete once all of the necessary General tab fields have been completed, the General tab is successfully saved and the Bid document has been assigned a number along the top of the document.

If you created this Bid from scratch, you will also see a red error message along the top informing you that Items need to be added. You can now proceed to Step 3 – establishing the line-items that can be bid upon.

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Step 3

Establishing the line-items that can be bid on

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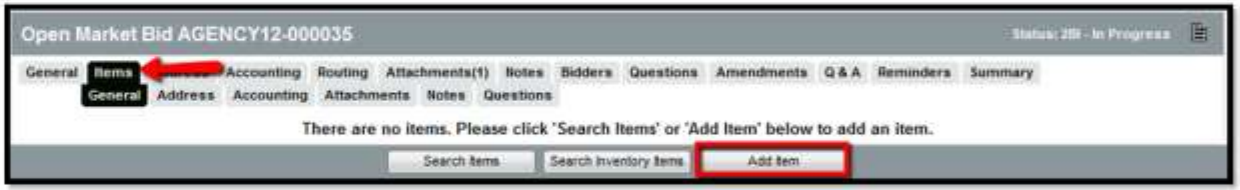
Step 3 – Checklist

- ☐ Go to the Items tab
- ☐ Create & complete an item
- ☐ Save & repeat for each necessary item

Step 3 – Adding an Item



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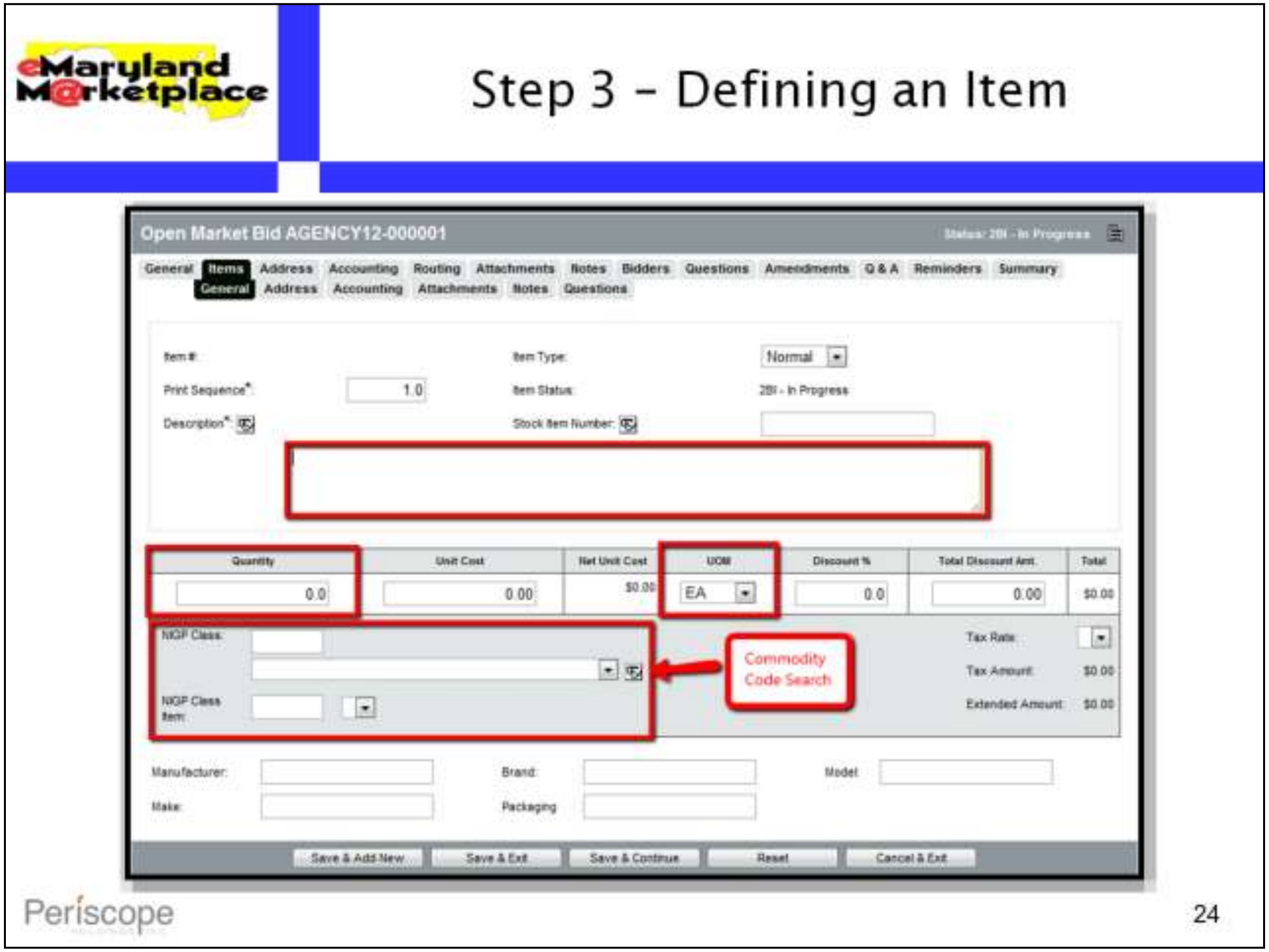
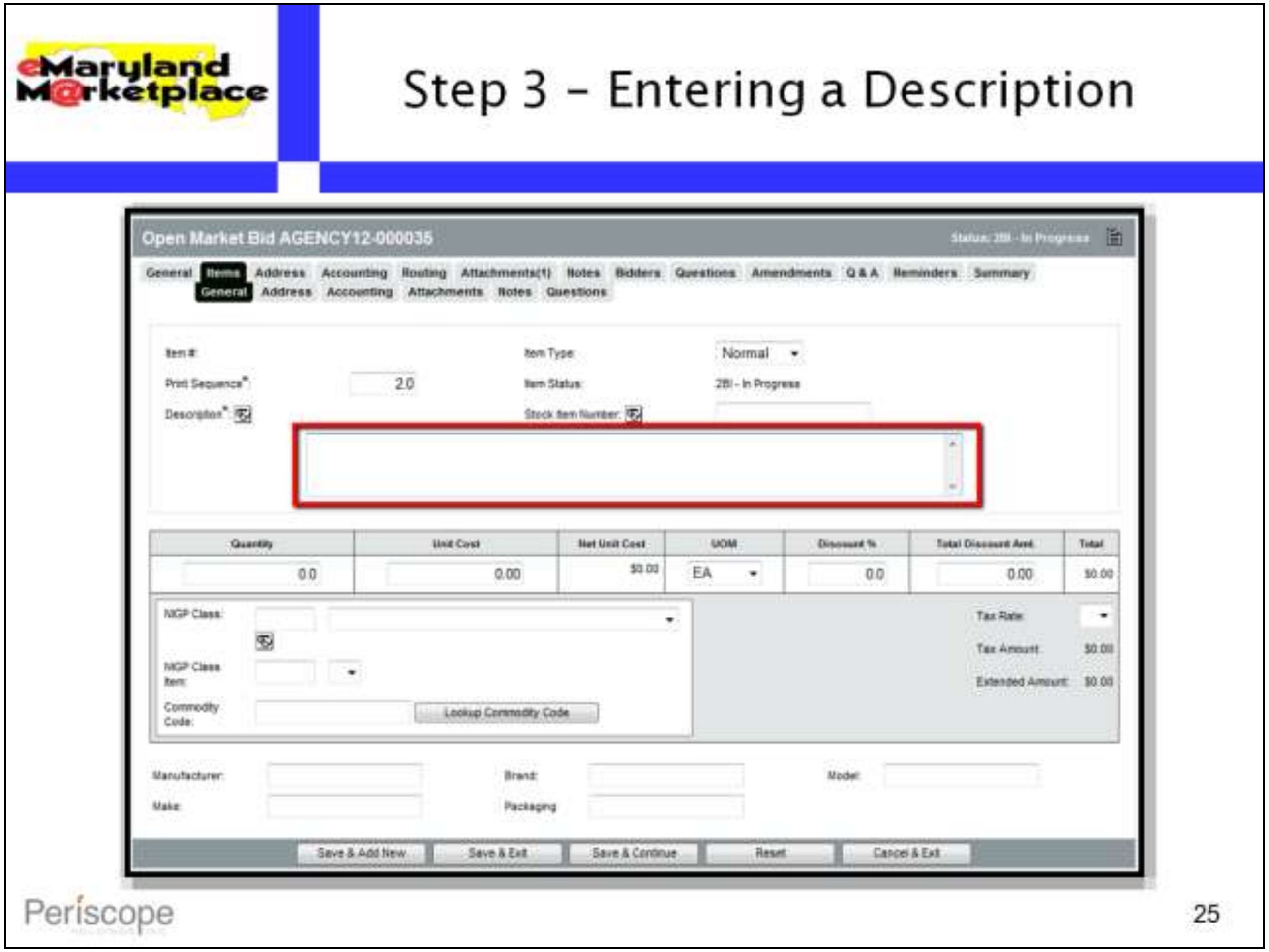
To complete Step 3 go to the Items tab. The Items tab will display the goods/services that vendors will provide price quotes for in their responses to the solicitation. You can also create “Narrative” items in order to relay information or instructions to vendors that cannot be bid upon.

Every Bid must have at least one “Normal” item, or a good/service that will be bid upon. Click **Add Item** to add a new item.



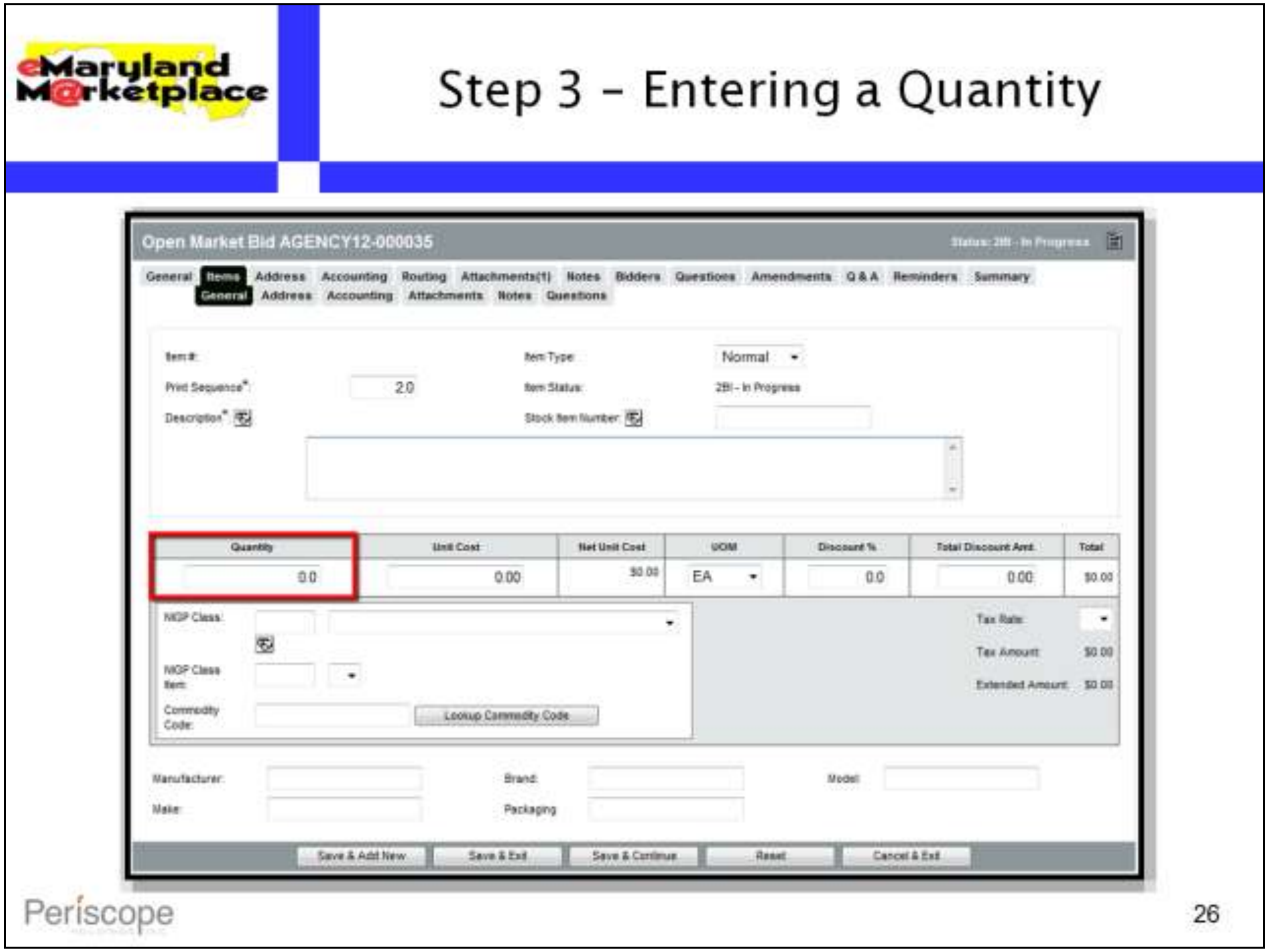
Upon selecting **Add Item** on the Items tab, a screen within the Items tab that allows you to define every aspect of an item will display. The screen will appear blank if you are adding the item, allowing you to create a new item in the system.

The four fields highlighted are required to set up an item – Description, Quantity, UOM (Unit of Measure) and NIGP Class & Class Item (5-digit commodity code). You can also input a Unit Cost as an estimate if desired. By default, vendors will not be able to see your estimated Unit Cost.



The Description field for an item can be used for a variety of purposes including:

- Providing as many details about the item as possible
- Pointing vendors to attached documents that will contain more information or specifications for the item
- Providing instructions for bidding on the item (such as providing pricing in an attached spreadsheet)
- Directing vendors either to use or not use the **Alternate Description** field that is available to them

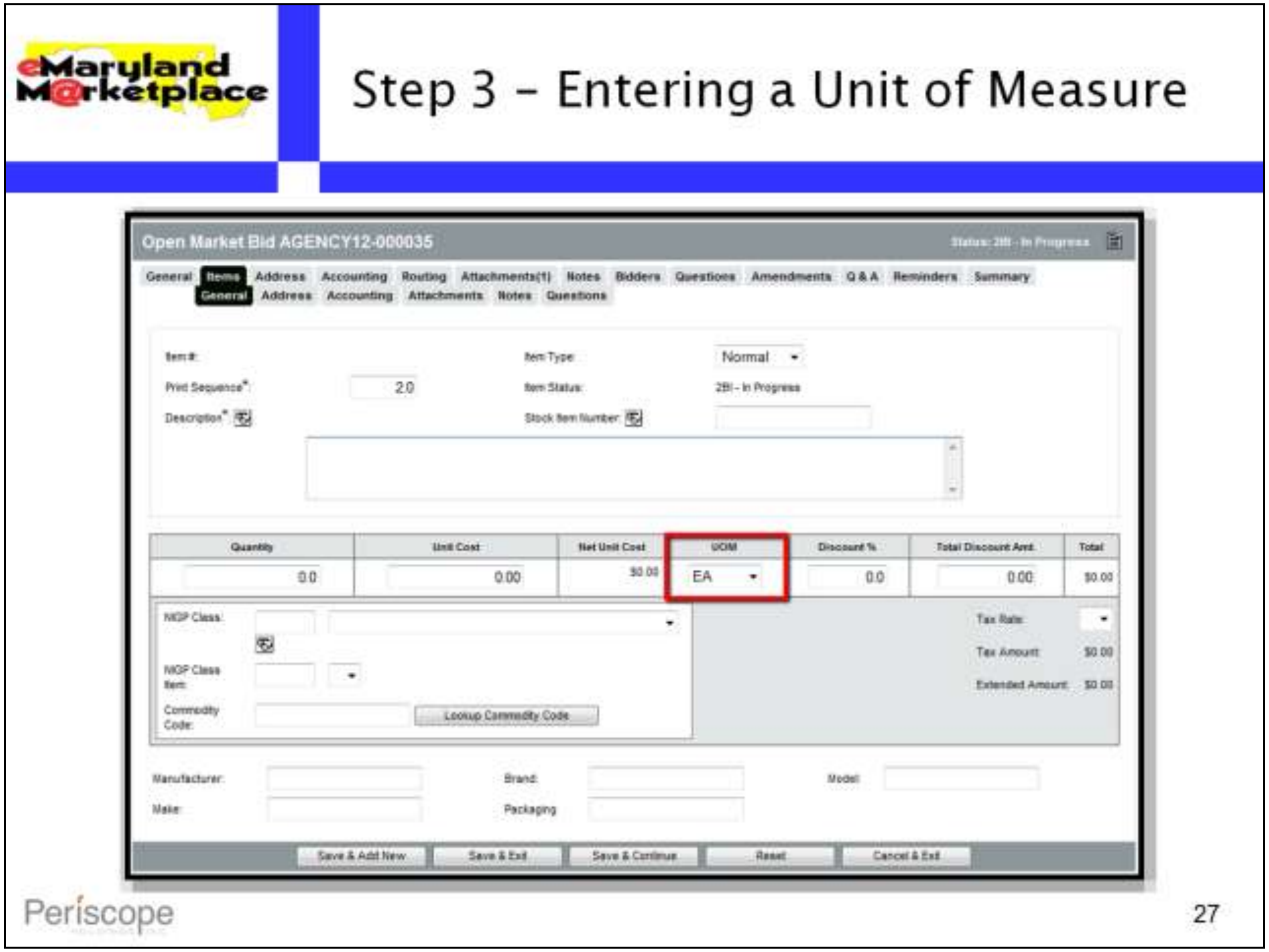


A quantity must be provided for every Normal (biddable) item on your Bid. If you do not know the quantity of an item that will be needed, there are a few different methods for communicating to vendors how to respond:

• If an indefinite or unknown quantity is needed, you can input a quantity of "1," which will allow you to compare vendors' price for a single unit of the item. It is advised that you include in the **Item Description** field either the minimum expected quantity, or that an indefinite quantity is being requested.

• If you would like to allow vendors to provide pricing based on differing quantities (e.g. 1-99, 100-999, 1000+), then you can either create a separate line item for each quantity grouping, input a quantity of "1," and in the **Item Description** field either provide your own quantity groupings or tell vendors to provide the quantities matching their quoted price in the **Alternate Description** field available to vendors on their Quote documents.

• If you wish to allow vendors to completely define their various price breaks by quantity, you can have them complete a Price Sheet that you attach to the Bid outlining what they charge for ordering various quantities of the item. For this method, it is advised that you setup a Narrative item to point vendors to the attached Price Sheet. **It is also important to remember that at least one "Normal" item must be included on your Bid, and vendors must provide a price quote for an item in order to be available for award.** If necessary, you can setup one general item and direct vendors in the description of the item to provide a standard price quote, such as $0.01 or **No Charge**.

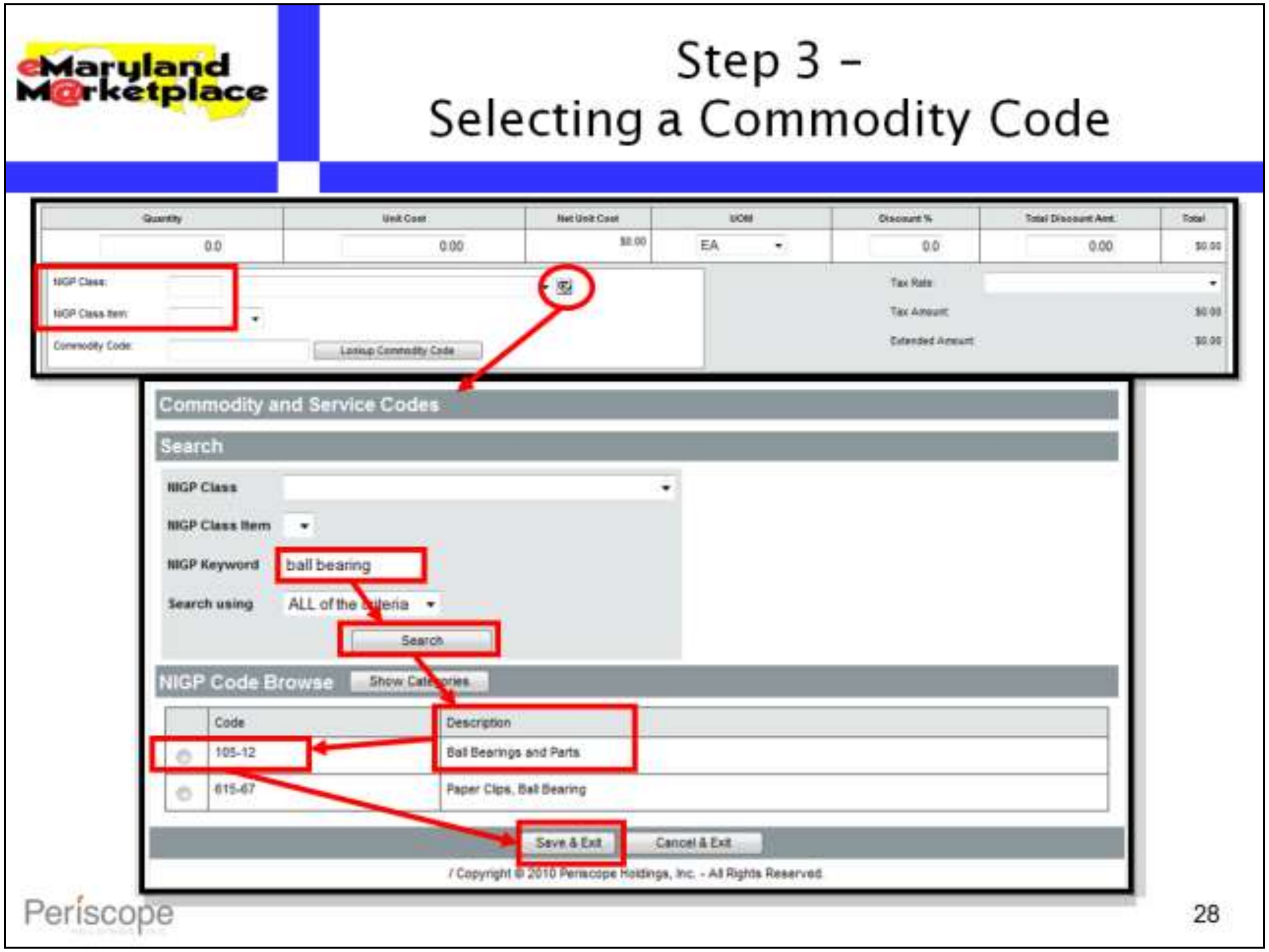


A unit of measure must be also provided for every Normal item on your Bid. If you do not know the unit of measure of an item that will be needed, or if multiple units of measure are suitable, there are a few different methods for communicating to vendors how to respond:

• If the unit of measure is unknown, you can input "EA" (each), which will allow you to compare vendors' pricing for a single unit of the item. It is advised that you explain in the **Item Description** field that that vendors can express an alternate unit of measure in the **Alternate Description** field available on vendors' Quote documents.

• If you would like to allow vendors to provide pricing based on differing units of measure (e.g. each, package, box), then you can either create a separate line item for each possible unit of measure, and in the **Item Description** field explain to vendors that they should only provide price quotes for the units of measure they are able to provide.

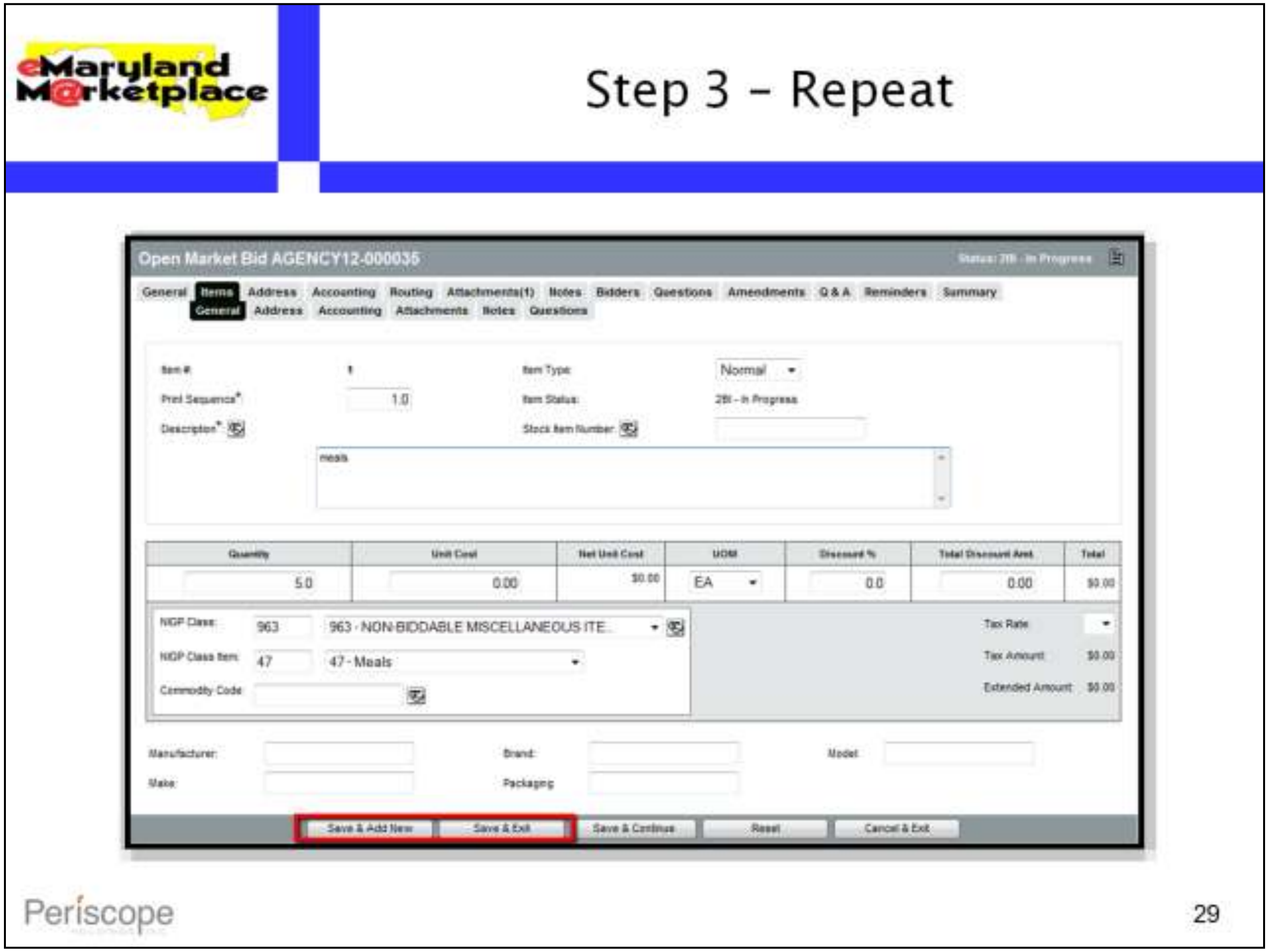
• If you wish to allow vendors to define the various units of measure they offer, you can also have them complete a Price Sheet that you attach to the Bid outlining what they charge for ordering various units of measure of the item. For this method, it is advised that you setup a Narrative item to point vendors to the attached Price Sheet. **It is also important to remember that at least one "Normal" item must be included on your Bid, and vendors must provide a price quote for an item in order to be available for award.** If necessary, you can setup one general item and direct vendors in the description of the item to provide a standard price quote, such as $0.01 or **No Charge**.



A 5-digit commodity code must be selected for each Normal item that you create. There are 2 ways to select a commodity code:

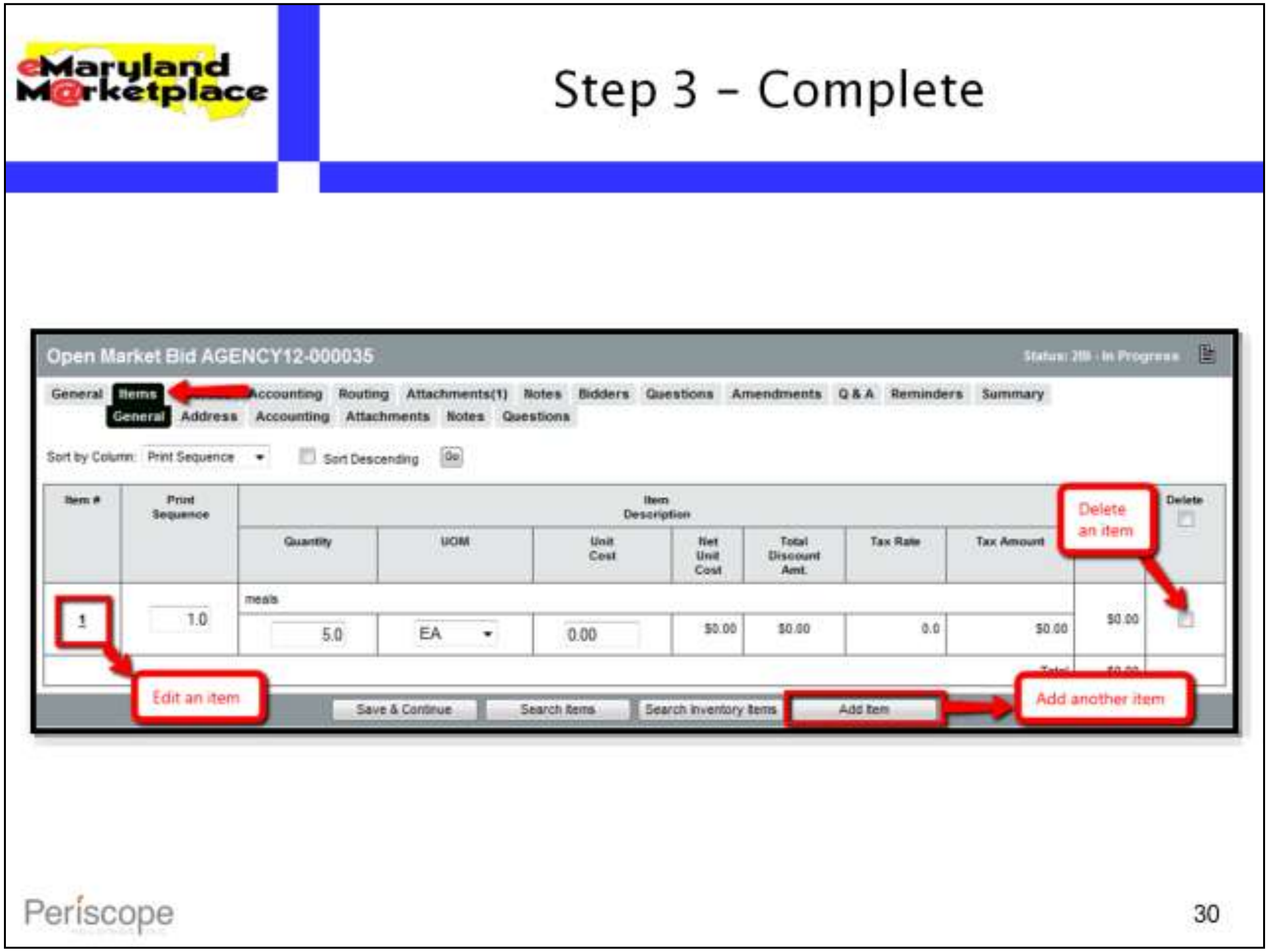
- If you already know the code you wish to use, you can simply type it into the **NIGP Class (3-digit)** and **NIGP Class Item (2-digit)** fields or you can select it from their associated dropdown boxes.
- If you do not know the appropriate code for the item, you can conduct a search by selecting the eyeglass icon next to the **NIGP Class** dropdown. Selecting this will open a pop-up window displaying the **Commodity and Service Codes** screen. You can conduct a search by typing information into the **NIGP Keyword** field and clicking **Search**. All commodity code descriptions containing the word(s) you've entered will appear. Once you select a code and click **Save & Exit**, the pop-up window will close and the selected code will automatically populate the **NIGP Class** and **Class Item** fields.

Note that **you do NOT need to enter anything into the "Commodity Code" field or select the "Lookup Commodity Code" button.**



Once you have completed the necessary fields on the Item screen, you are ready to save the item and create another item, if desired. To quickly create another new item to complete, click the **Save & Add New** button on the bottom of the screen. A new blank Item screen will appear allowing you to describe and save another item to your Bid document.

After all desired items have been added, click the **Save & Exit** button on the bottom of the Items screen.



Step 3 is complete once the complete list of your items displays on the Items tab screen. From the Items tab you can edit, sort and delete the items as needed. Once you're done building your items, click **Save & Continue** before proceeding.

You can now proceed to Step 4 – attaching the necessary documentation.

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Step 4

Attaching the necessary documentation

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Step 4 – Checklist

- ☐ Go to the Attachments tab
- ☐ Attach all necessary documents

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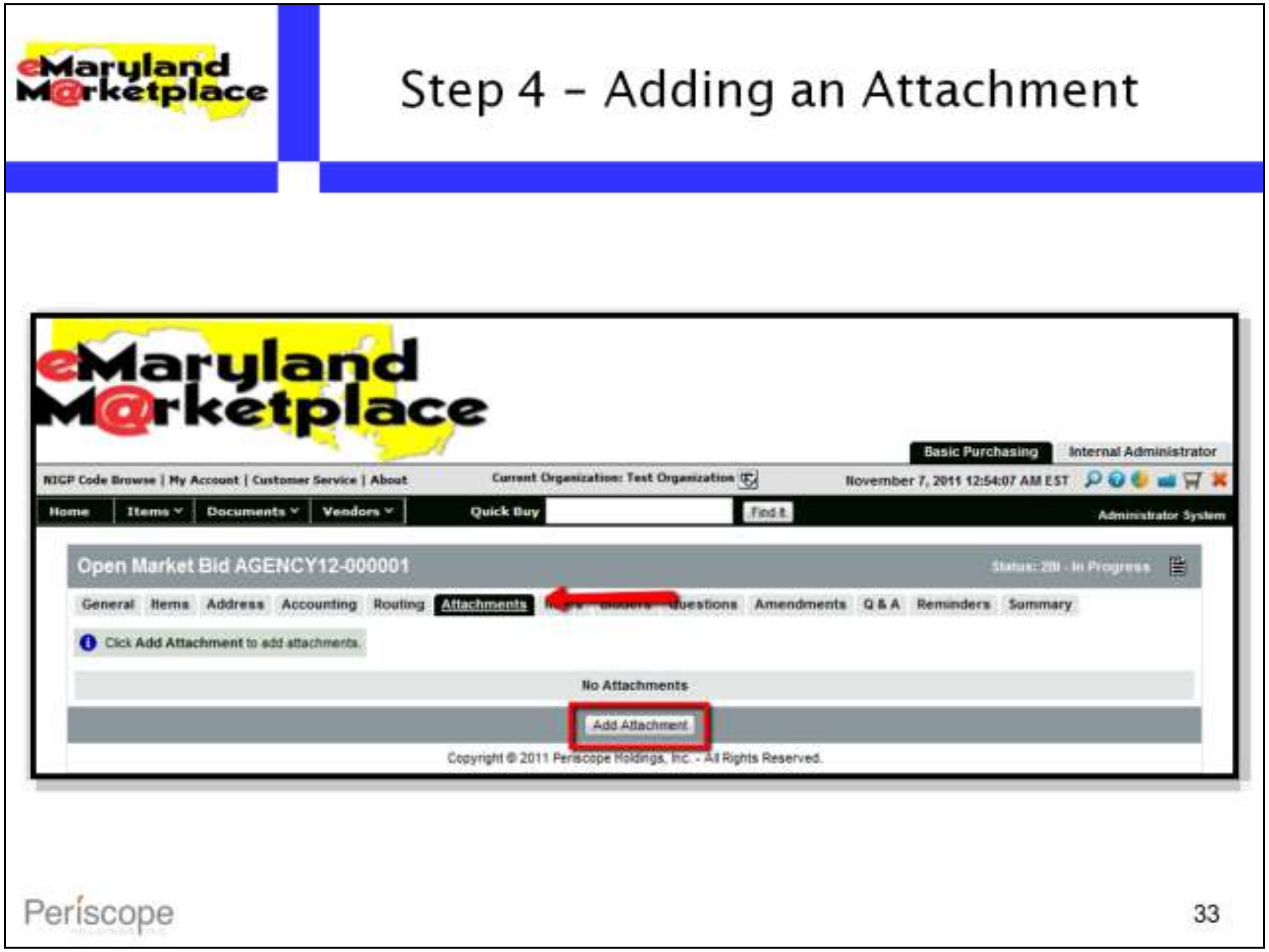
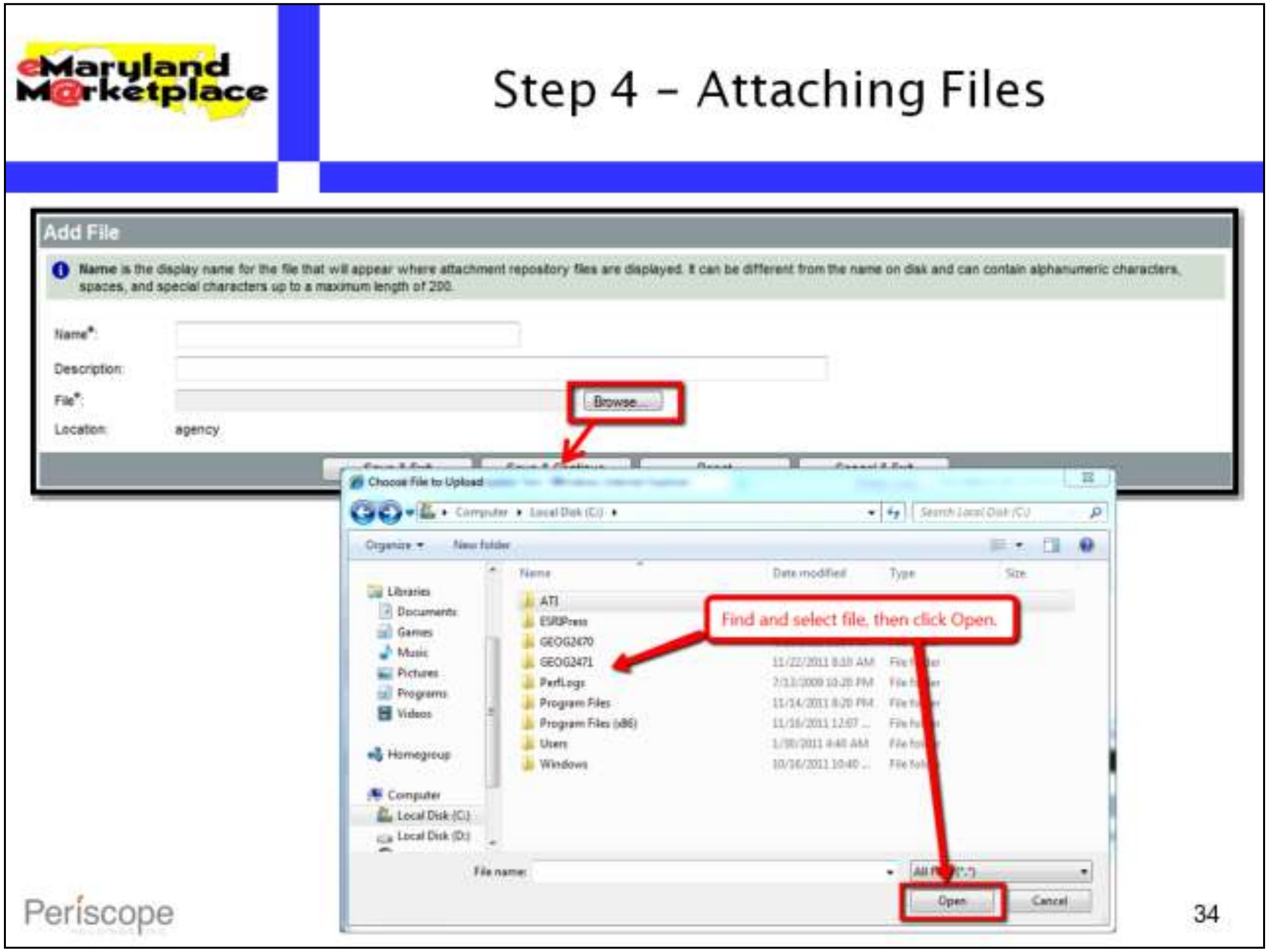


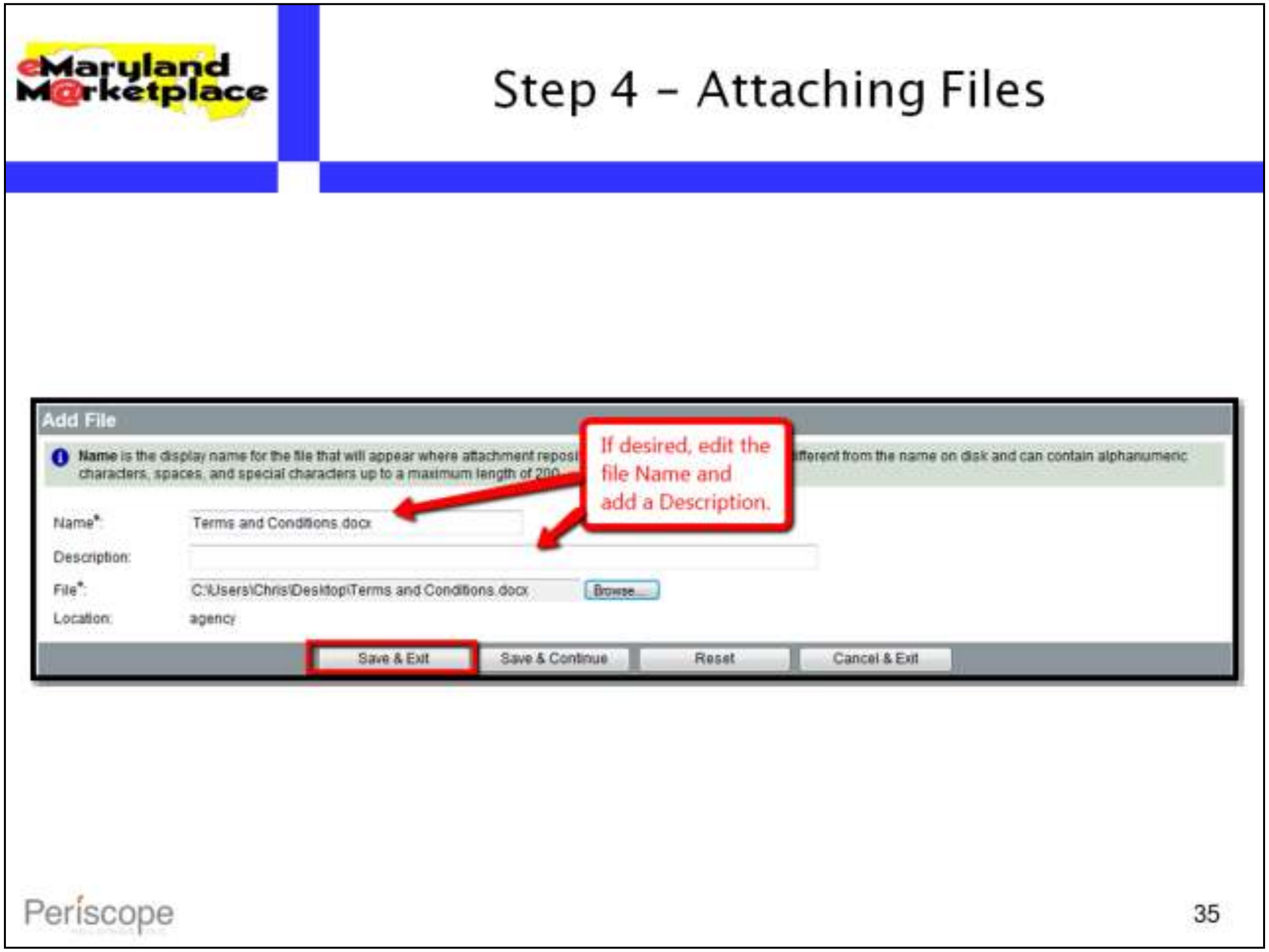
The official documentation related to your solicitation, including Terms and Conditions, Instructions, Specifications, etc. will be attached to the Bid document via the Attachments tab. You will need to complete these documents outside of eMaryland Marketplace and attach them to your Bid.

From the Attachments tab, click **Add Attachment**.

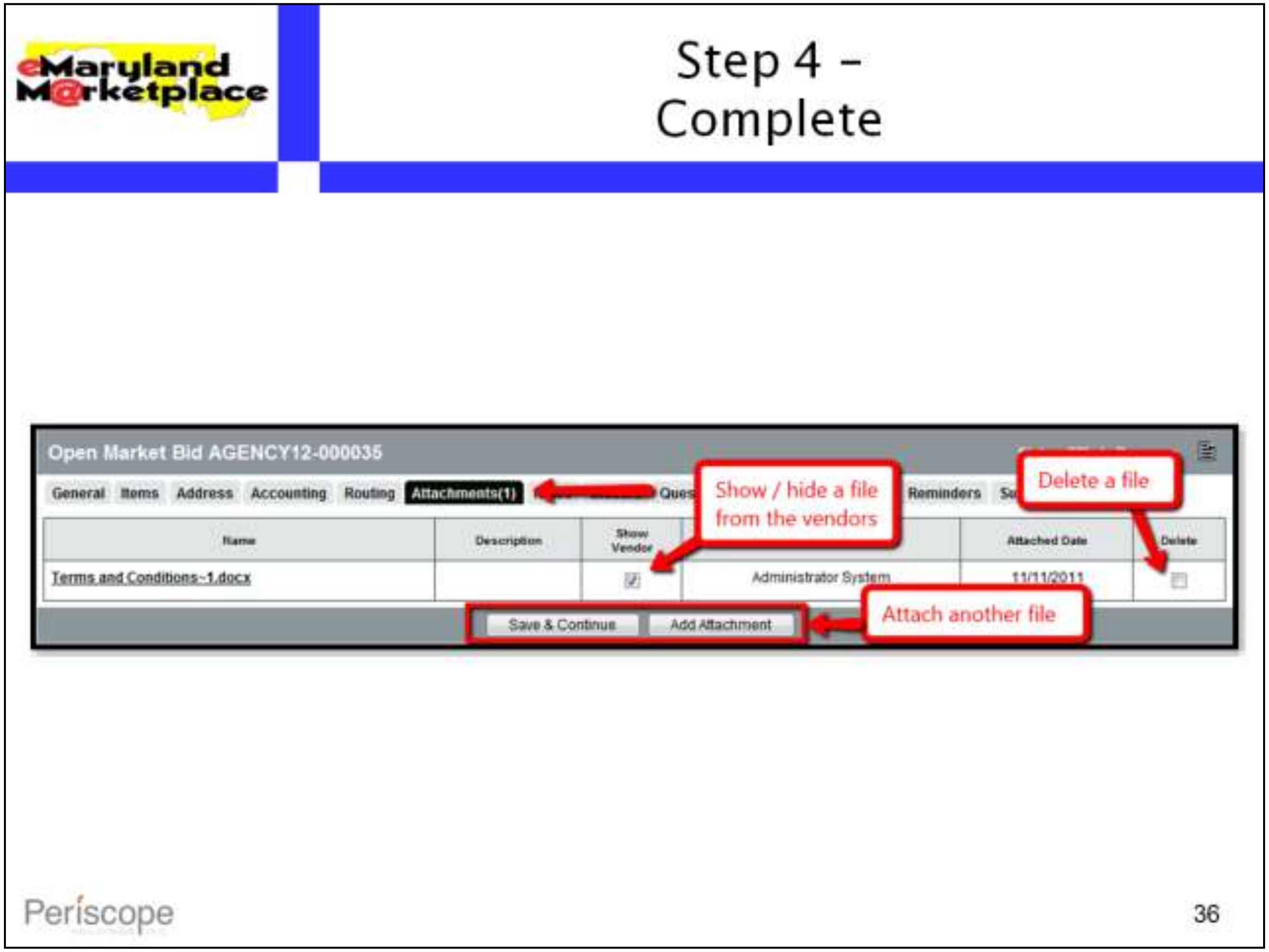


The **Add File** screen will display. Next, click the **Browse** button, which will open a pop-up window enabling you to find the folder on your computer where the document is located. Once you've found the document you'd like to attach, you can double-click the document, or select it and then click "Open."

The pop-up window will now close and details about the document will display in the **Name** and **File** fields. You can edit the **Name** of the file that will appear on the Attachments tab, but do NOT attempt to edit the **File** information, as you may disable the ability to download the file. You can also provide a **Description** of the document if you choose. Once complete, click **Save & Exit** to return to the Attachments tab. Your document is now attached to the Bid. Note that attachments will appear in the order that they are attached.



The pop-up window will now close and details about the document will display in the **Name** and **File** fields. You can edit the **Name** of the file that will appear on the Attachments tab, but do NOT attempt to edit the **File** information, as you may disable the ability to download the file. You can also provide a **Description** of the document if you choose. Once complete, click **Save & Exit** to return to the Attachments tab. Your document is now attached to the Bid. Note that attachments will appear in the order that they are attached.



Step 4 is complete once the complete list of your attachments displays on the Attachments tab screen. From the Attachments tab you can configure which attachments (if any) should be hidden from the vendors, and delete attachments as needed. Click **Save & Continue** if you make any changes to a file and once you're done attaching files.

You can now proceed to Step 5 – selecting the vendors to notify about the solicitation.

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Step 5

Selecting the vendors to notify about the solicitation

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Step 5 - Checklist

- ☐ Go to the Bidders tab
- ☐ Search for the vendors to notify
- ☐ Select the vendors to notify and save

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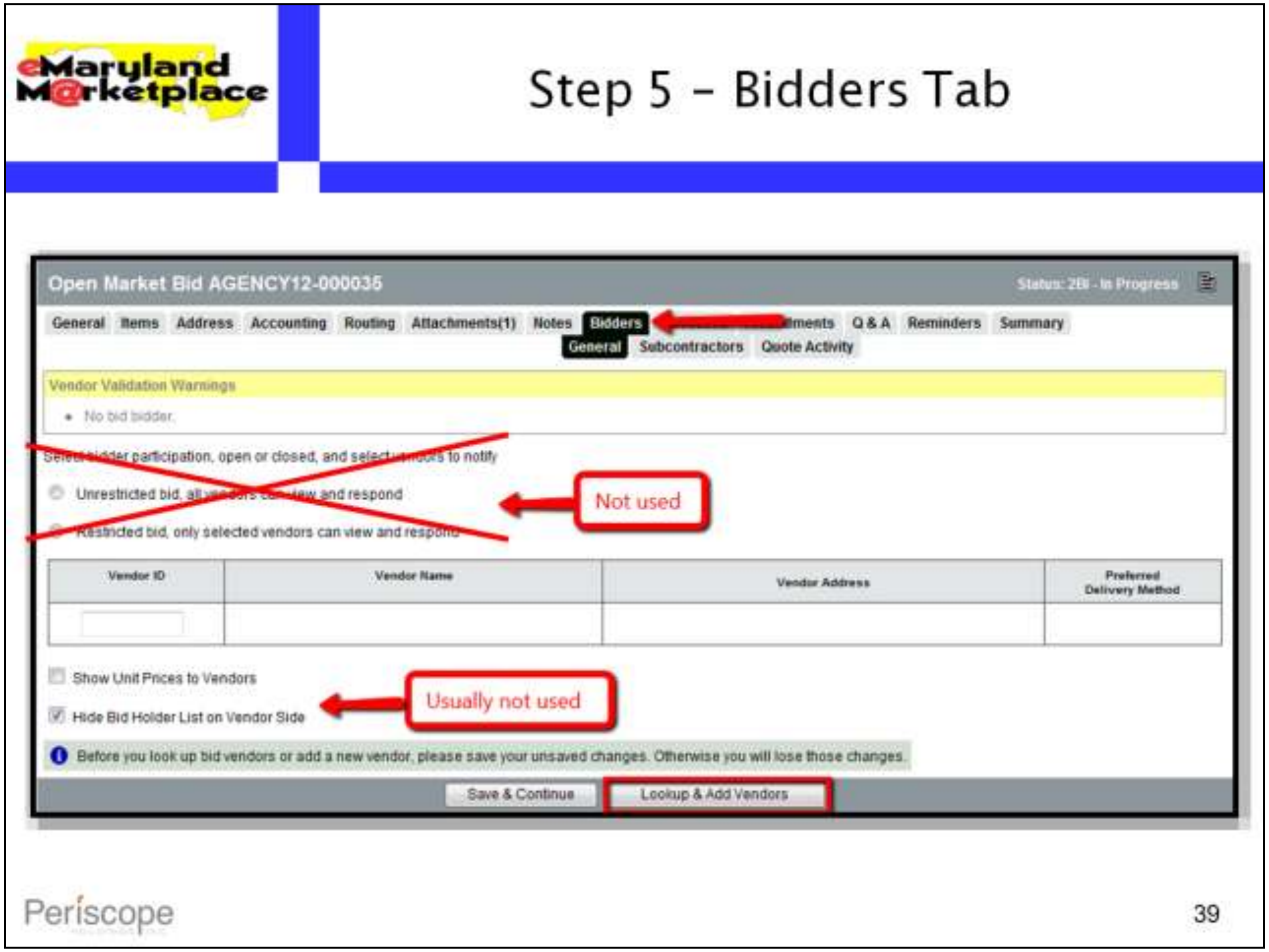
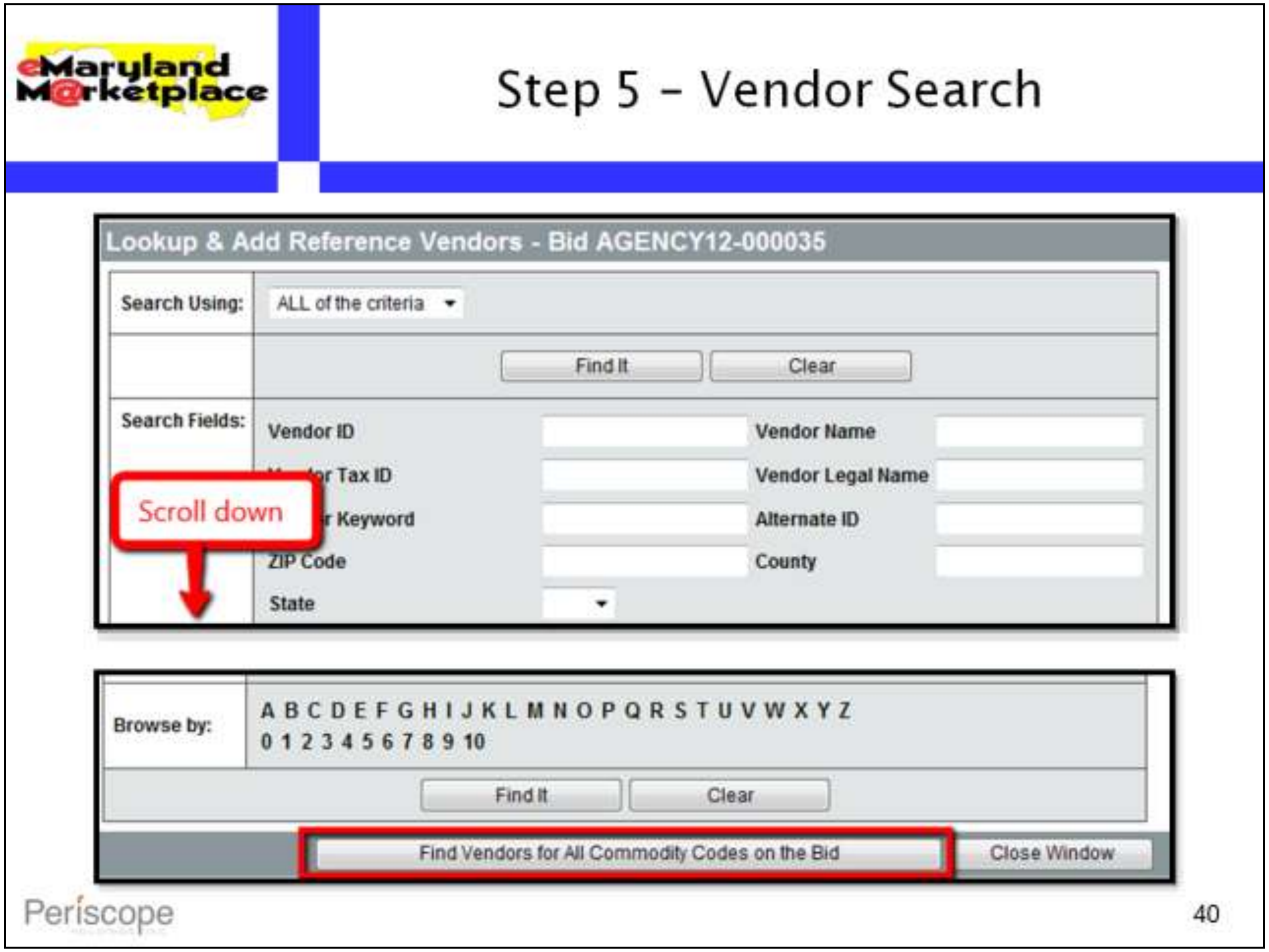


The Bidders tab is where you can select the vendors that will be notified about this solicitation. You can also set some vendor viewing privileges related to the Bid on this tab. Note the options which are not used. Selecting either of these options will have no effect on your Bid. These settings are now controlled by the **Bid Type** field on the General tab. The vendor viewing configuration options on this screen include:

• The **Show Unit Prices to Vendors** field, which when checked displays any price estimates entered on the Items tab to vendors. This option is unchecked by default so that vendors are not given an idea of how much you are expecting to spend per item.

• The **Hide Bid Holder List on Vendor Side** field, which when checked will not allow vendors to see the other vendors that may respond to the solicitation. This option is checked by default so that vendors do not know who their potential competitors are.

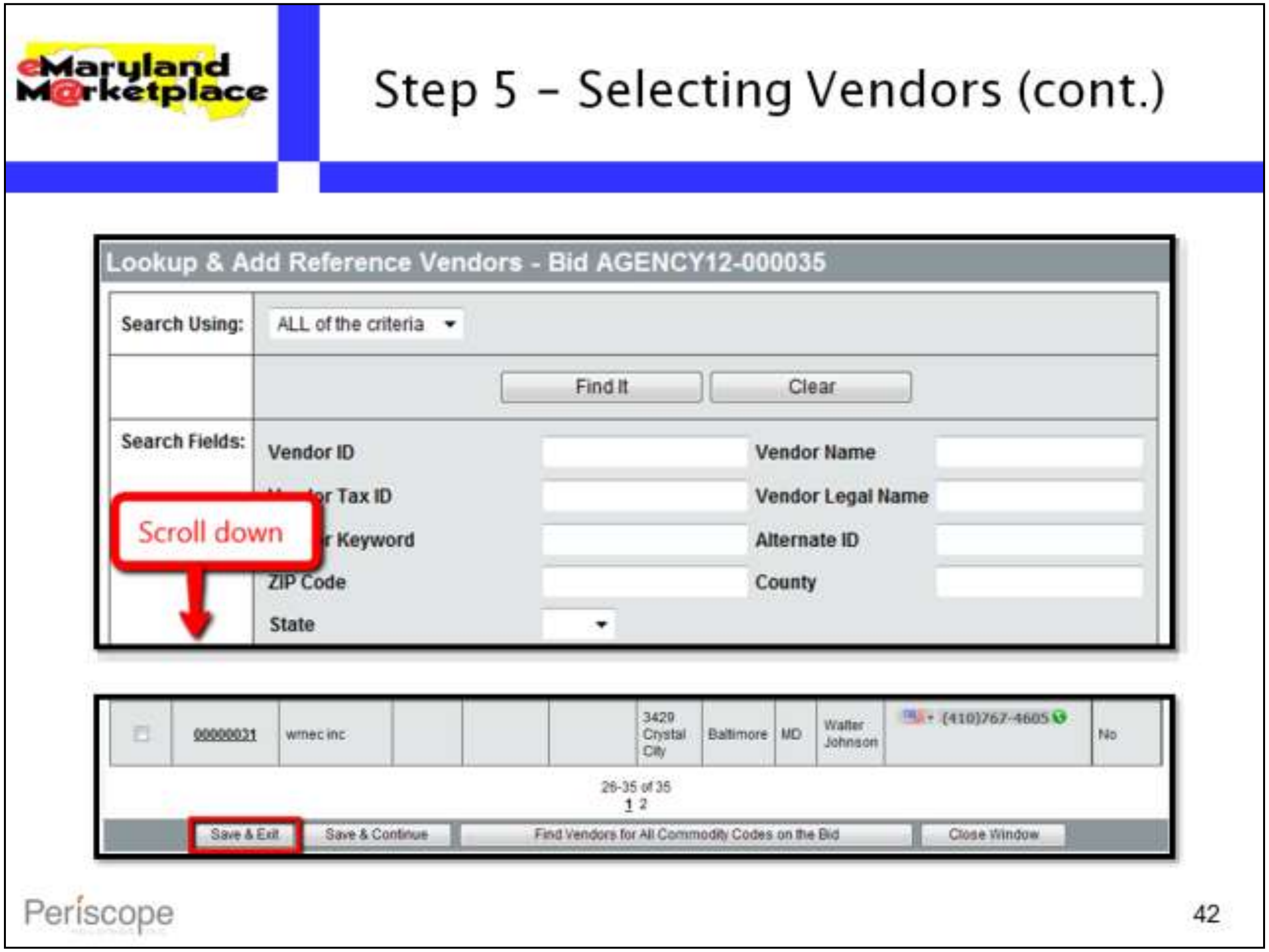
If you make changes to either of those fields, click **Save & Continue**. Once you are ready to add vendors that will be notified, click **Lookup & Add Vendors** on the bottom of the screen.



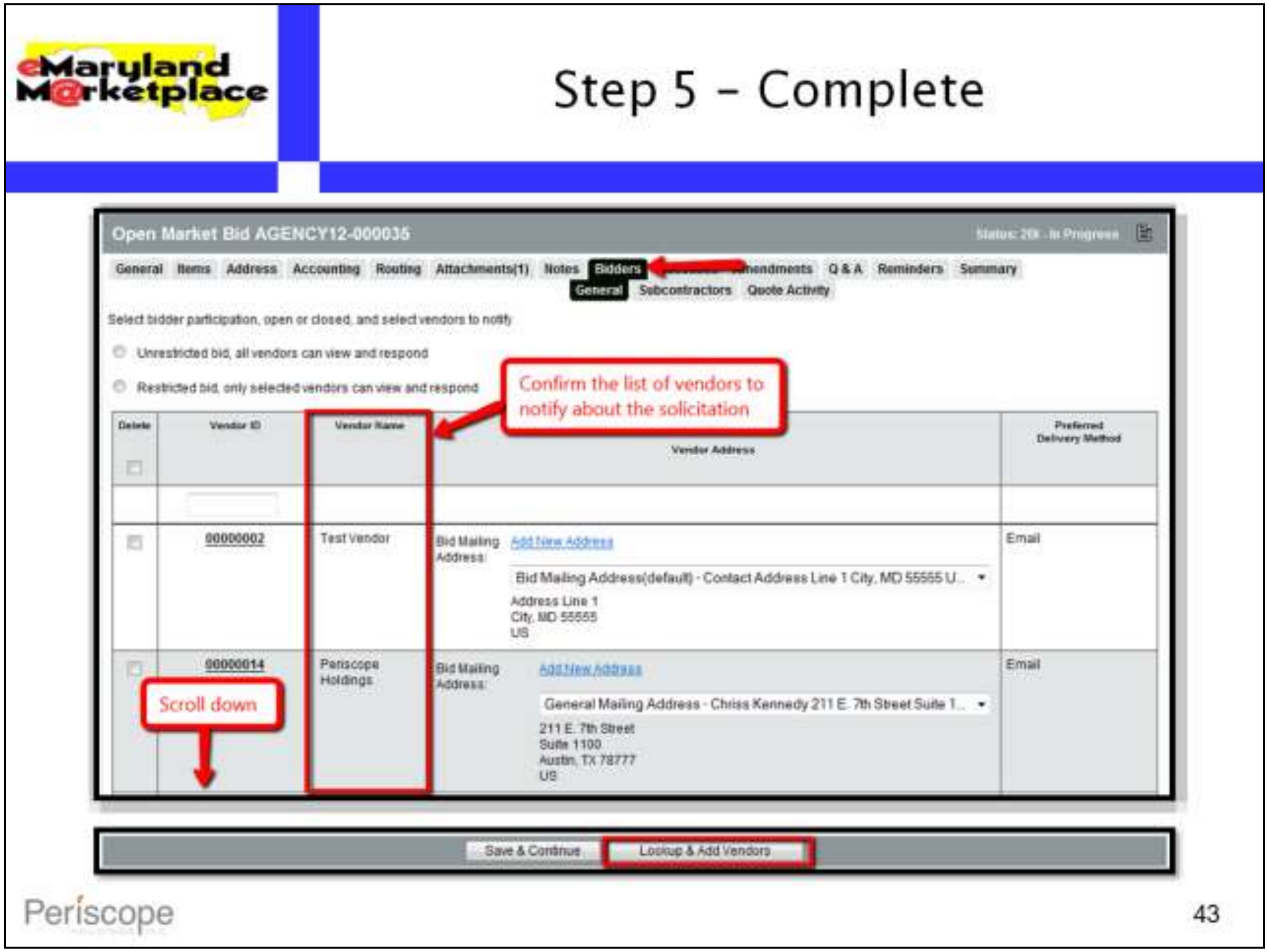
Selecting **Lookup & Add Vendors** will display a pop-up window that enables you to search for vendors by a variety of criteria, including vendor name, tax ID, NIGP commodity code, and the specific categories vendors were made to complete when registering within eMaryland Marketplace. Scroll down to the bottom of the screen and click the **Find Vendors for All Commodity Codes on the Bid** button to return all vendors that have registered with the commodity codes associated with the items on your Bid.

Your vendor search results will appear below the search area. Scroll down until you see the list of vendors. To select all of the vendors on this page, select the check box in top row in the **Select** column.

Next, scroll down to the bottom of the screen. If additional pages of vendors returned from your search, click **Save & Next Page** and repeat this step until all pages of vendors have been selected and this button no longer appears.



Once all pages of vendors have been selected and saved, and the **Save & Next Page** button no longer appears, click **Save & Exit** on the bottom of the screen.



Step 5 is complete once the complete list of vendors to notify about the solicitation appears on the Bidders tab. From the Bidders tab you can search and add more vendors to notify by clicking the **Lookup & Add Vendors** button on the bottom of the screen.

You can now proceed with one or more optional steps or go to Step 6 – submitting the solicitation for approval.

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Optional Bid Steps

Notes, Reminders, Questions and Q&A

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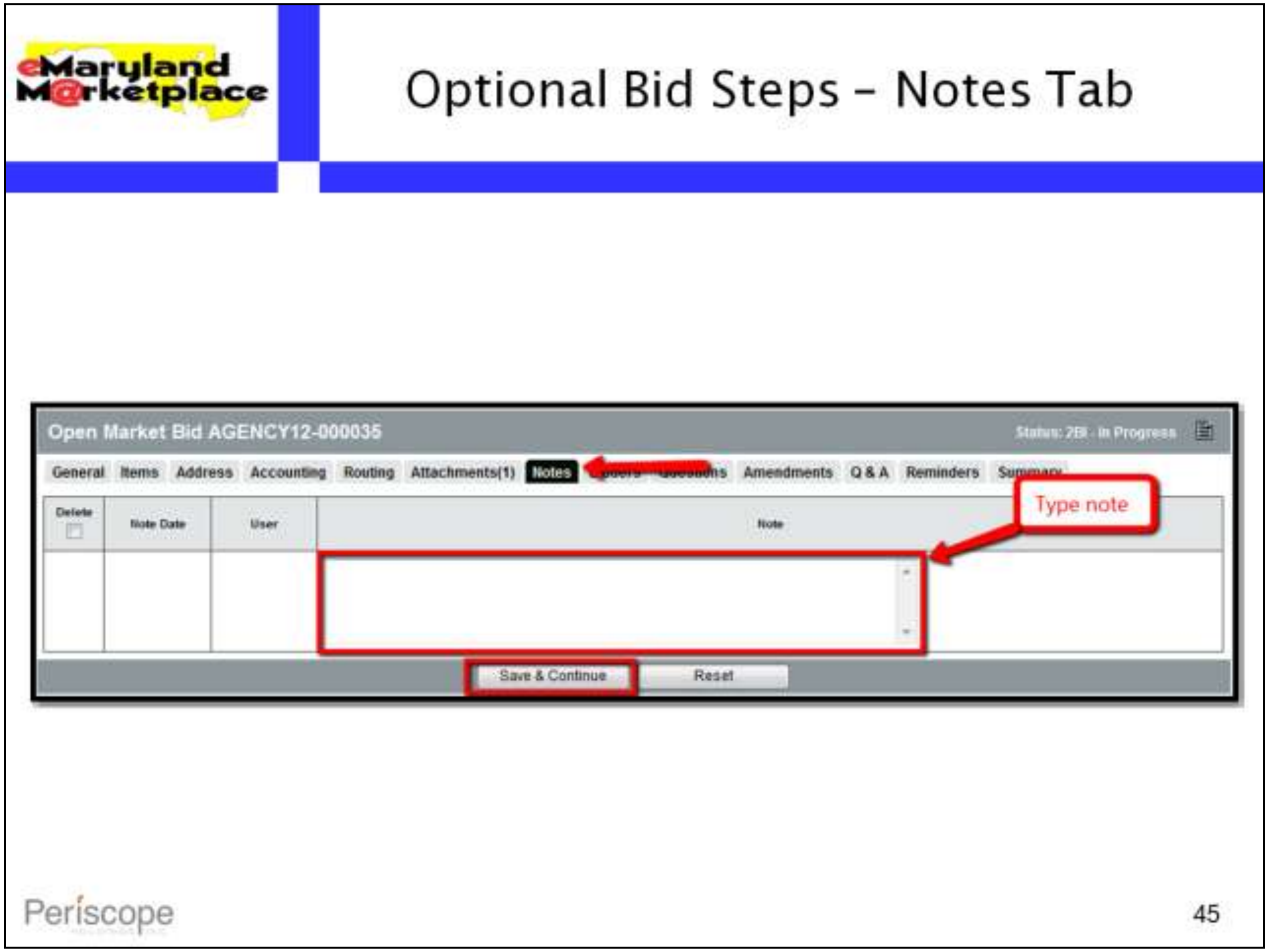
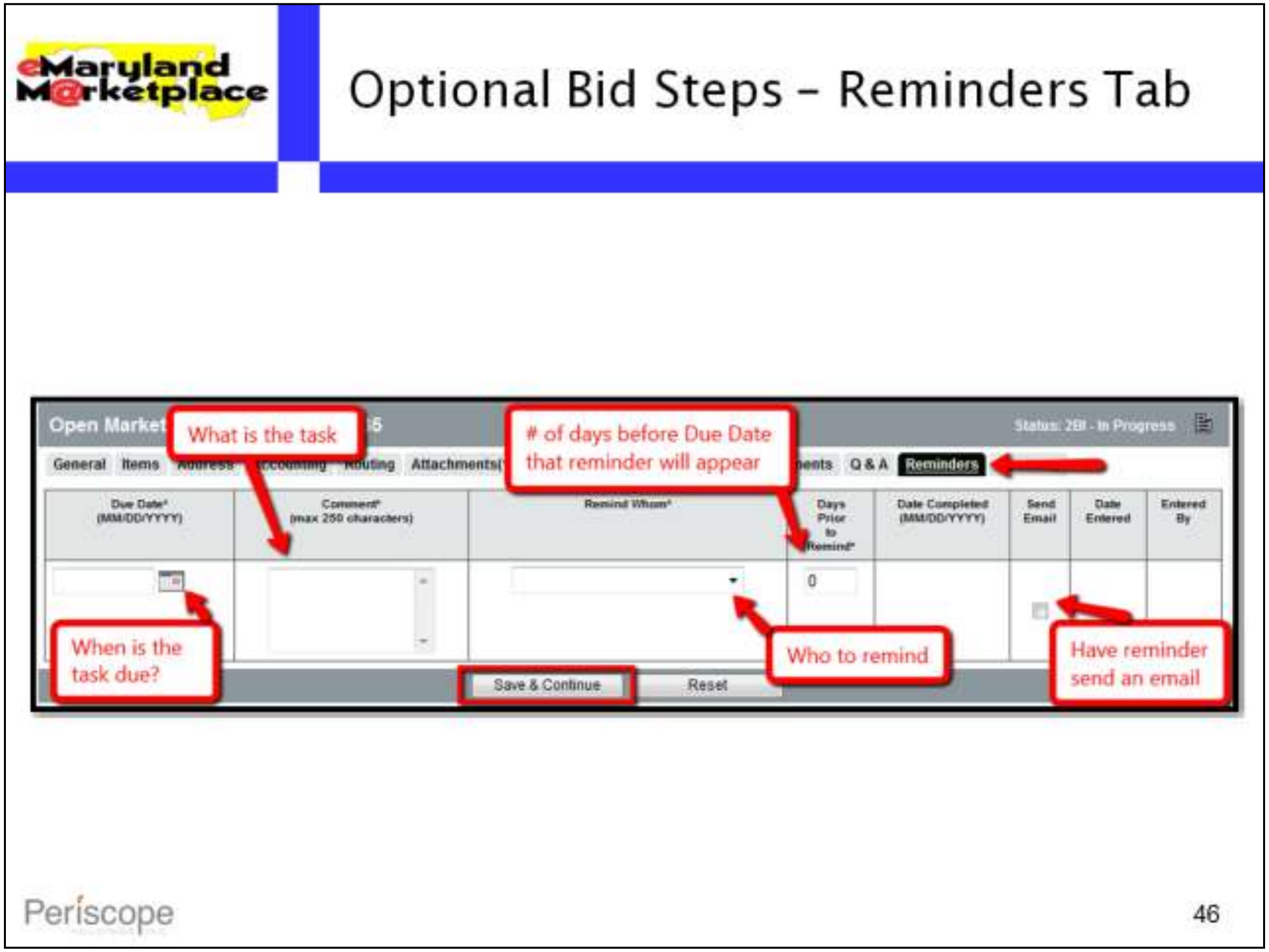


The Notes tab enables you to create notes about the document that are only visible to users from your Organization accessing the document. Notes are created by simply typing in a note in the **Note** field on the Notes tab. Once you are finished with the note, click **Save & Continue** and another text field will appear allowing you to enter in another note, if desired.

Notes automatically record the date they were entered and user that entered them. After you have added a note, you can delete it by clicking the check box in the **Delete** column on the far left and selecting **Save & Continue**.



The Reminders tab enables you to setup alerts related to the document for yourself or other users from your Organization. Once a reminder takes effect, it appears on the **My Reminders** tab on the Homepage of the user you set the reminder up to alert. To setup a reminder, complete the following fields:

- **Due Date** is the day by which the activity you are setting up the reminder about should be completed
- **Comment** allows you to define the activity that needs to be completed
- **Remind Whom** allows you to select one user that should be reminded about the activity. You must duplicate the reminder to alert additional users.
- **Days Prior to Remind** is the number of days prior to the **Due Date** that the reminder should appear to the user you chose to remind.
- **Send Email**, when checked, will send the user you chose to remind an email at the same time the reminder appears on their Homepage. The **Comment** field will be the body of the email.

Once complete, click **Save & Continue**. This will display another blank row allowing you to setup another reminder if desired.

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Optional Bid Steps – Questions Tab

Response Type	Description
AVAILABLE	Vendor can select one of the following: Fully provided, Not Provided, Custom Development Required, Provided With Modifications, Provided with Reporting or Development Tool
AVERAGE	Vendor can select one of the following: Poor, Below Average, Average, Above Average, Excellent
COMMENT	Vendor can provide text response of up to 250 characters.
SCALE10	Vendor can select a number from 1 to 10.
SCALE15	Vendor can select a number from 1 to 5.
TEXT	Vendor can provide text response of up to 4000 characters.
TRUEFALSE	Vendor can select either true or false.
YESNO	Vendor can select either yes or no.

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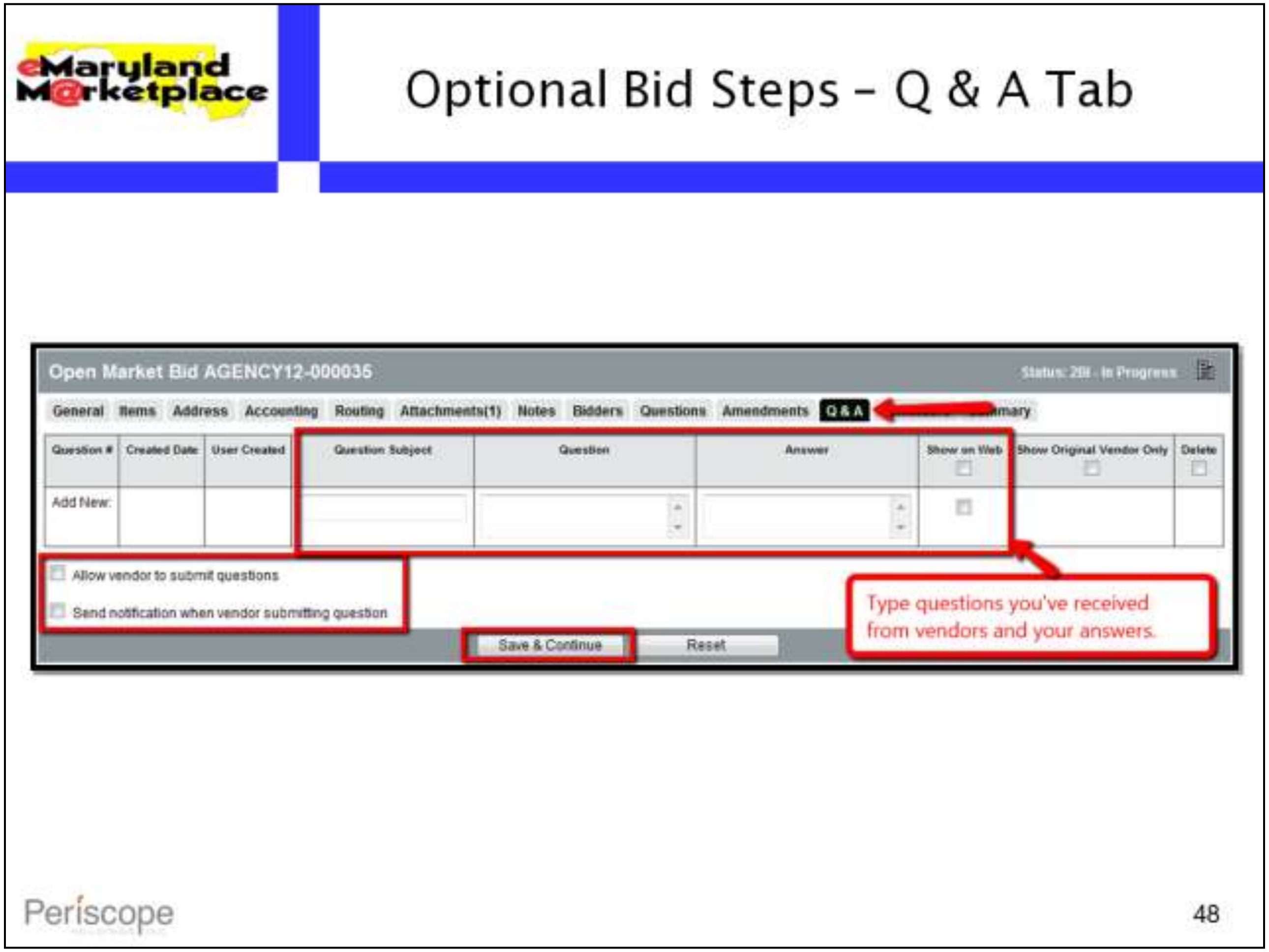
The Questions tab enables you to pose questions to vendors that they are asked to answer within their electronic response. You are able to configure the type of answer they are allowed to provide, as well as whether an answer to each Question is required before they can submit their response. To add a Question, type your question into the **Question** field. If you wish to make answering the Question a requirement for vendors before they can submit their Quote, select the check box in the **Required** column next to the Question.

Lastly, you will need to select what type of response vendors are allowed to provide to the questions by choosing an option in the dropdown box in the **Response Type** column. Once you are have added a Question, select **Save & Continue** and another row will appear enabling you to input another Question.

The table defines the available **Response Type** options when setting up Questions on your Bid.



Following the publishing of your Bid, you may get questions from vendors regarding the solicitation. eMaryland Marketplace enables you to document these questions and provide answers via the Q & A tab on the Bid. Vendors can then access this Q & A by viewing the Bid document.

Prior to publishing your solicitation, you can select options to enable vendors to submit their questions through eMaryland Marketplace once the solicitation is published by clicking **Allow vendor to submit questions**. These questions will appear on the Q & A tab and allow you to respond through eMaryland Marketplace.

NOTE: If responding to a question from a vendor requires an addendum, this must still be done. Providing answers and publishing them via the Q&A tab simply allows vendors to see your answers to questions you receive frequently in order to limit the repeat questions you are asked.

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Step 6

Submitting the solicitation for approval

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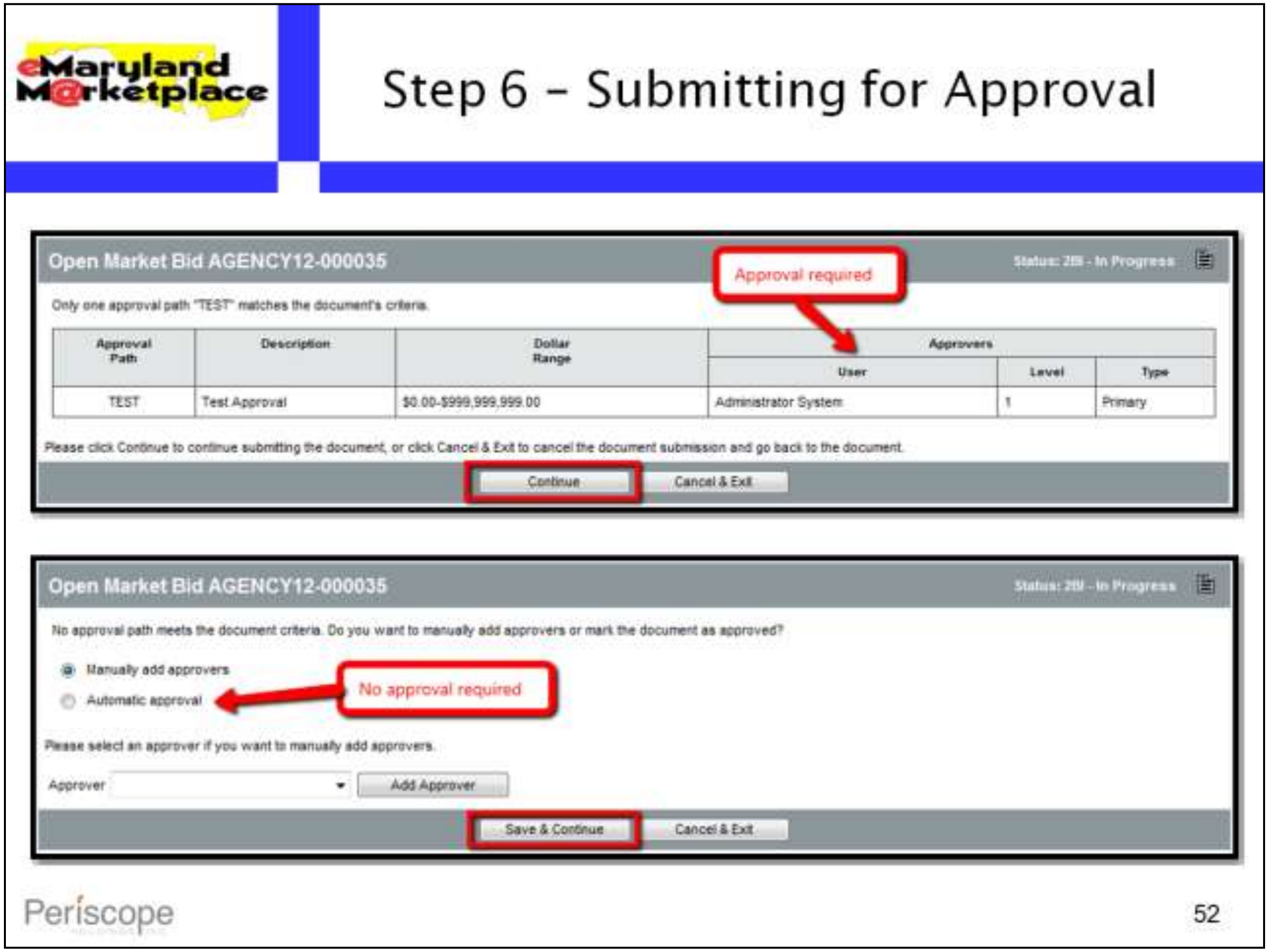
Step 6 – Checklist

- [ ] Go to the Summary tab
- [ ] Review the Bid document
- [ ] Submit the document for approval

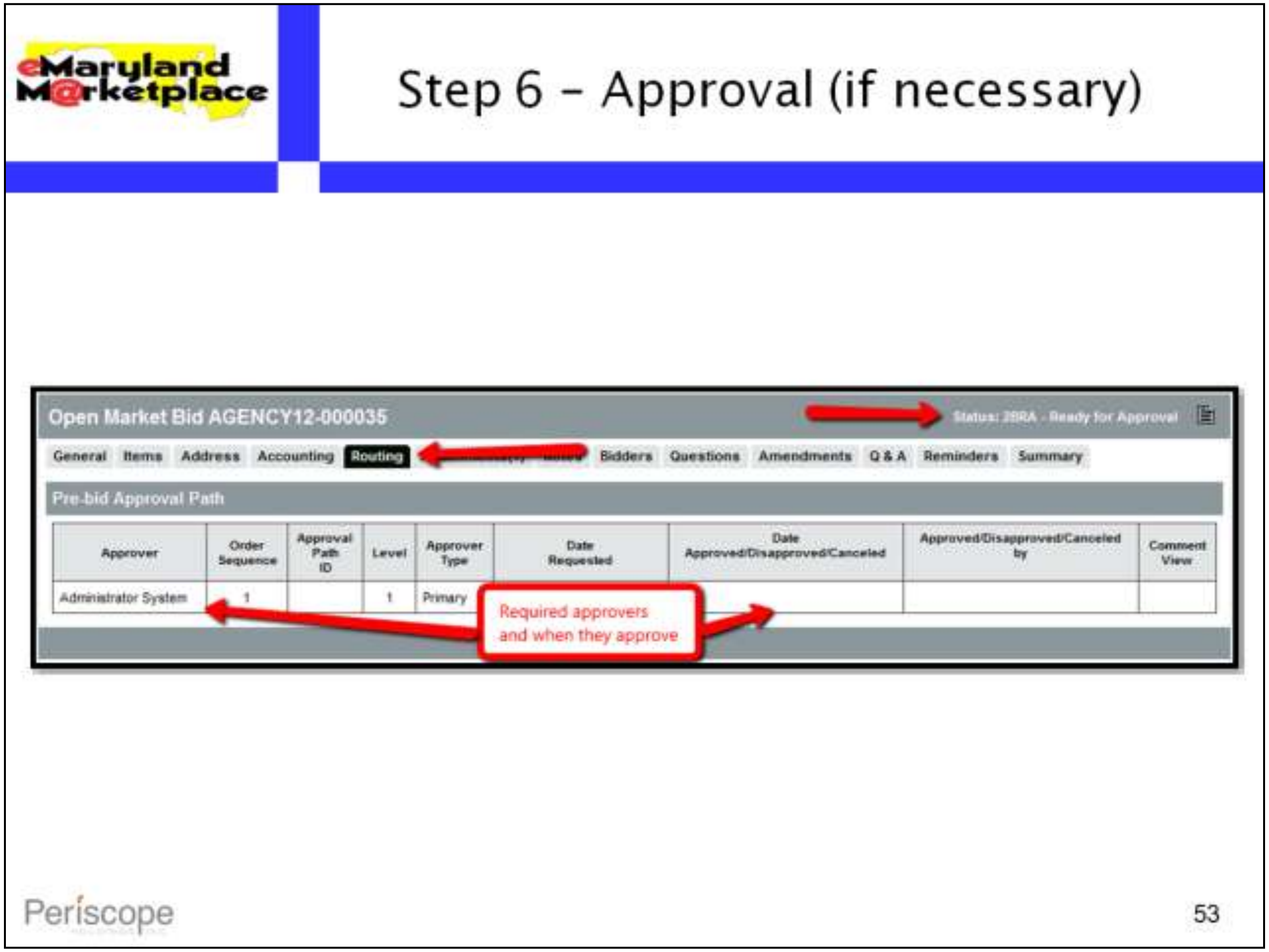
Once you have completed each of the necessary tabs, you can review all of the information you've entered on the Summary tab. If there are any issues with the information you've provided, validation warnings and/or errors will display along the top of the Summary tab. Yellow warnings do not require action on your part, but red errors require that you return to the appropriate tab and fix the issue before you are allowed to submit the Bid for approval.

Once you have corrected any issues and are ready to publish the solicitation, you can submit your Bid document for approval by clicking the **Submit for Approval** button on the bottom of the tab.

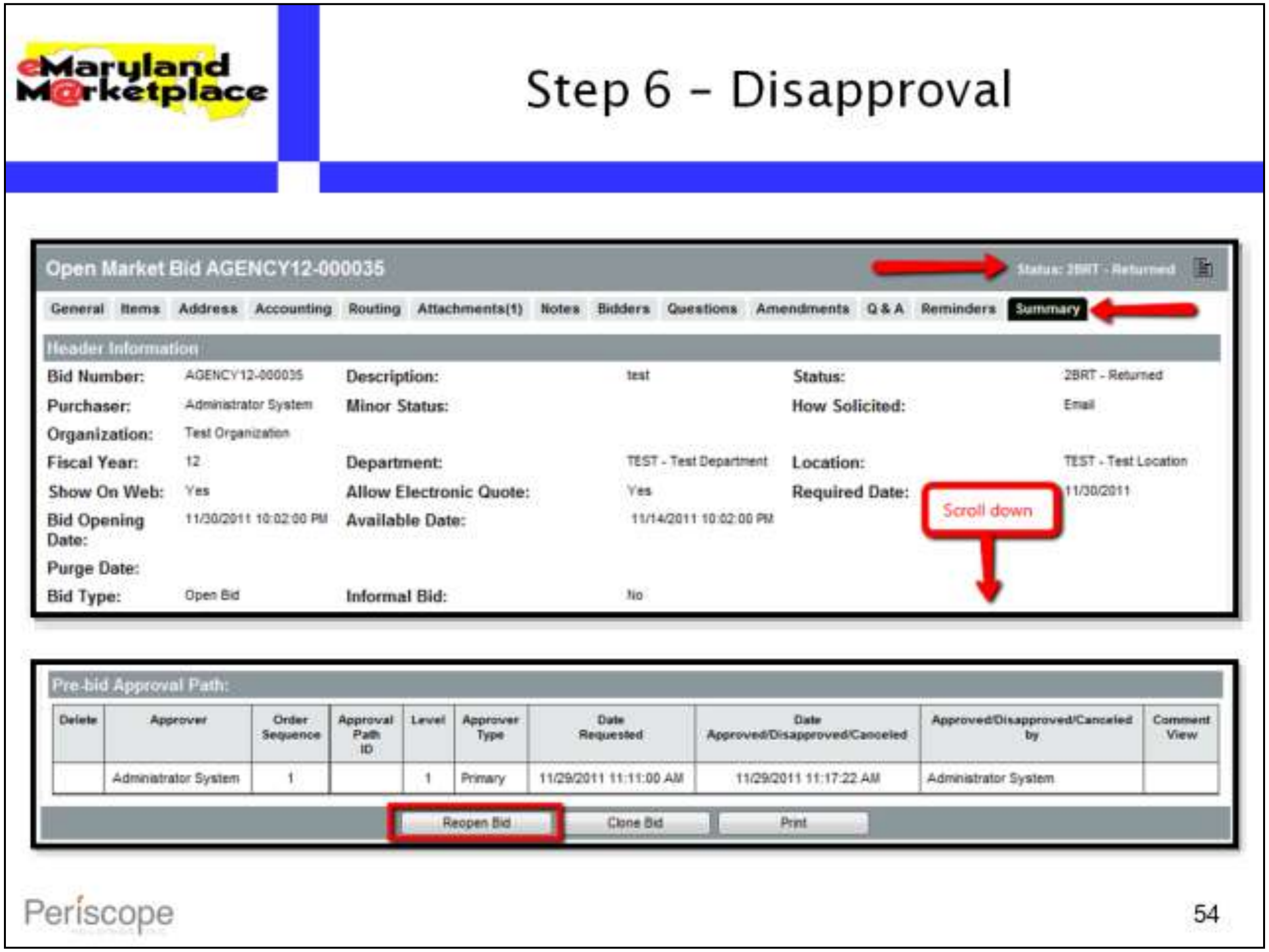


Upon clicking **Submit for Approval**, if approval is required before you post the solicitation, the users that must approve the document will be listed. Upon clicking **Continue**, the approvers will be notified once it is their turn to approve. Approvers can only approve/disapprove the Bid in the order they are listed on the approval path.

If no approval is required to post the solicitation, the **Manually add approvers** and **Automatic approval** options will appear. Click **Automatic Approval**, then **Save & Continue**. The document is automatically approved.



If approvals are required, upon clicking **Continue** on the previous screen, your Bid document will be in “Ready for Approval” status. You can view the status of the approval on the Routing tab, or along the bottom of the Summary tab.



If the document is disapproved by an approver, you will receive an email and the Bid will transition to “Returned” status. You can then edit the document again by clicking the **Reopen** button on the bottom of it’s Summary tab.

This returns the document to “In Progress” status so that you can edit it again. Once you are done editing the Bid, you must submit it for approval again by restarting this step.

Step 6 is complete once the Bid has been fully approved (if necessary) and enters a status of "Ready to Send."

You can now proceed with one or more optional steps or go to Step 7 – posting the solicitation.

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Step 7

Posting the solicitation

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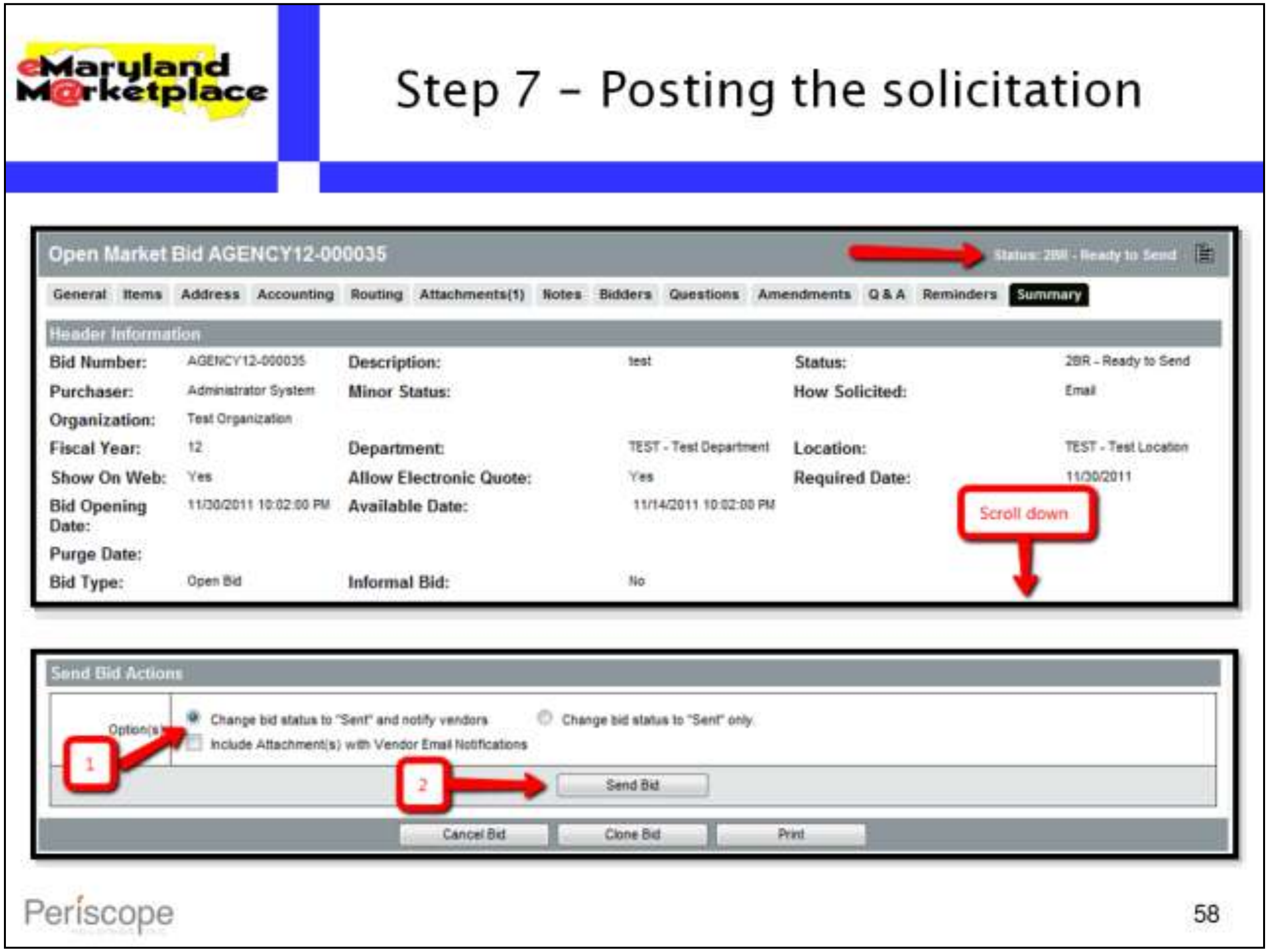
Step 7 – Checklist

- ☐ Go to the Summary tab
- ☐ Click Send

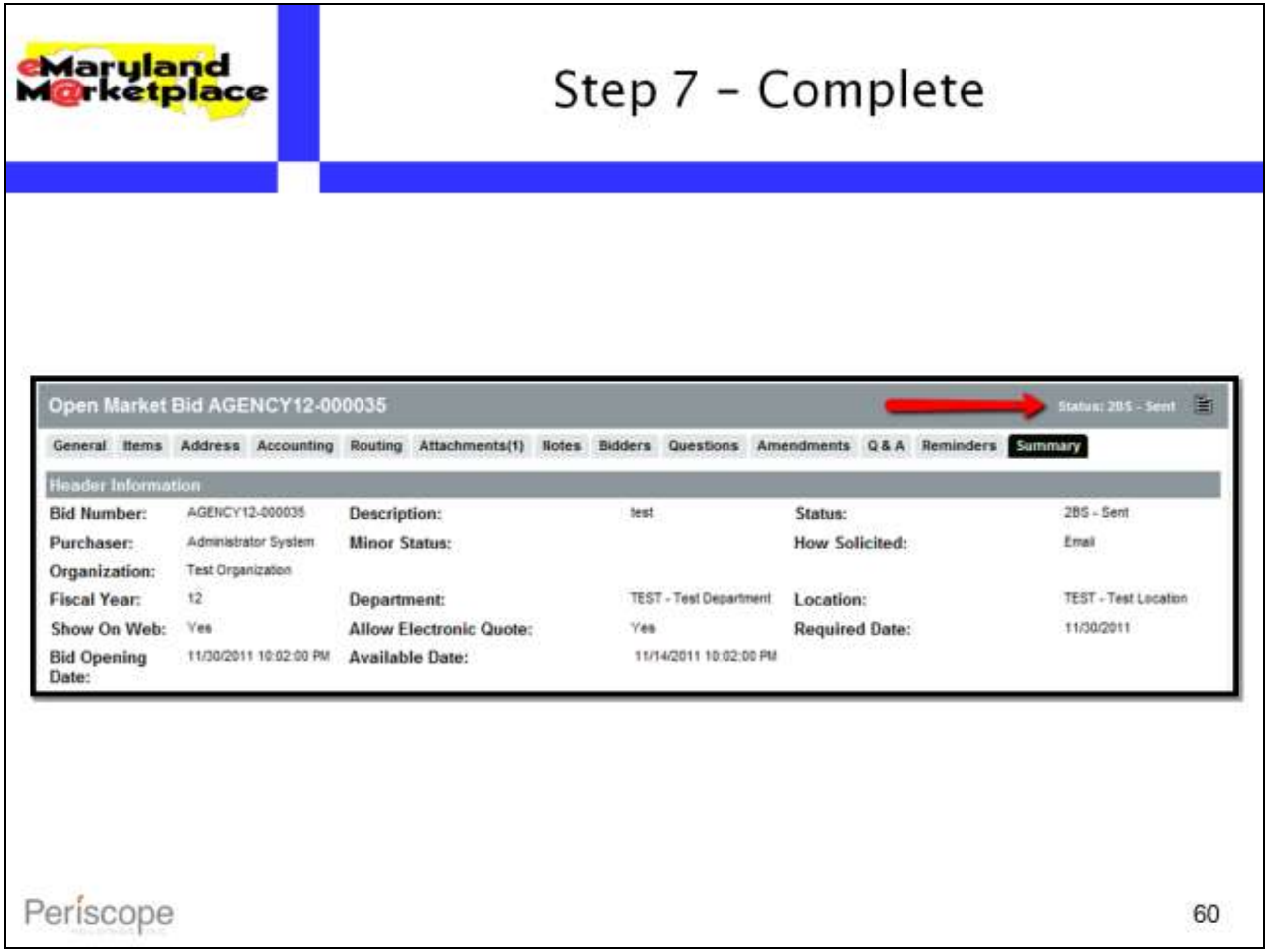


To post the solicitation, navigate to the Summary tab of the Bid. It must be in "Ready to Send" status. On the bottom of the screen in the **Send Bid Actions** section, select to **Change bid status to "Sent" and Notify Vendors**, then **Send Bid**.

NOTE: It is generally recommended to NOT select **Include Attachment(s) with Vendor Email Notifications**. If you do this and you are notifying a lot of vendors, this may slow down your email system.

If you selected vendors to notify on the Bidders tab of your Bid, the **Vendor Notification Result** screen will display all of the vendors that were notified and the email address that the notification was sent to. Click **OK** when you are through reviewing this screen.

NOTE: Even after sending a Bid, it will not be posted or allow response until the **Available Date** identified on the General tab of the Bid has been reached.



Step 7 is complete once the Bid enters a status of “Sent.”

You can now proceed with the Vendor steps or go to Step 8 – opening the solicitation responses.

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Vendor Step

Responding to the solicitation

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Vendor Step – Checklist

- ☐ Logout and view the posted solicitation
- ☐ Login as a vendor
- ☐ Find and review the solicitation
- ☐ Create and submit a response

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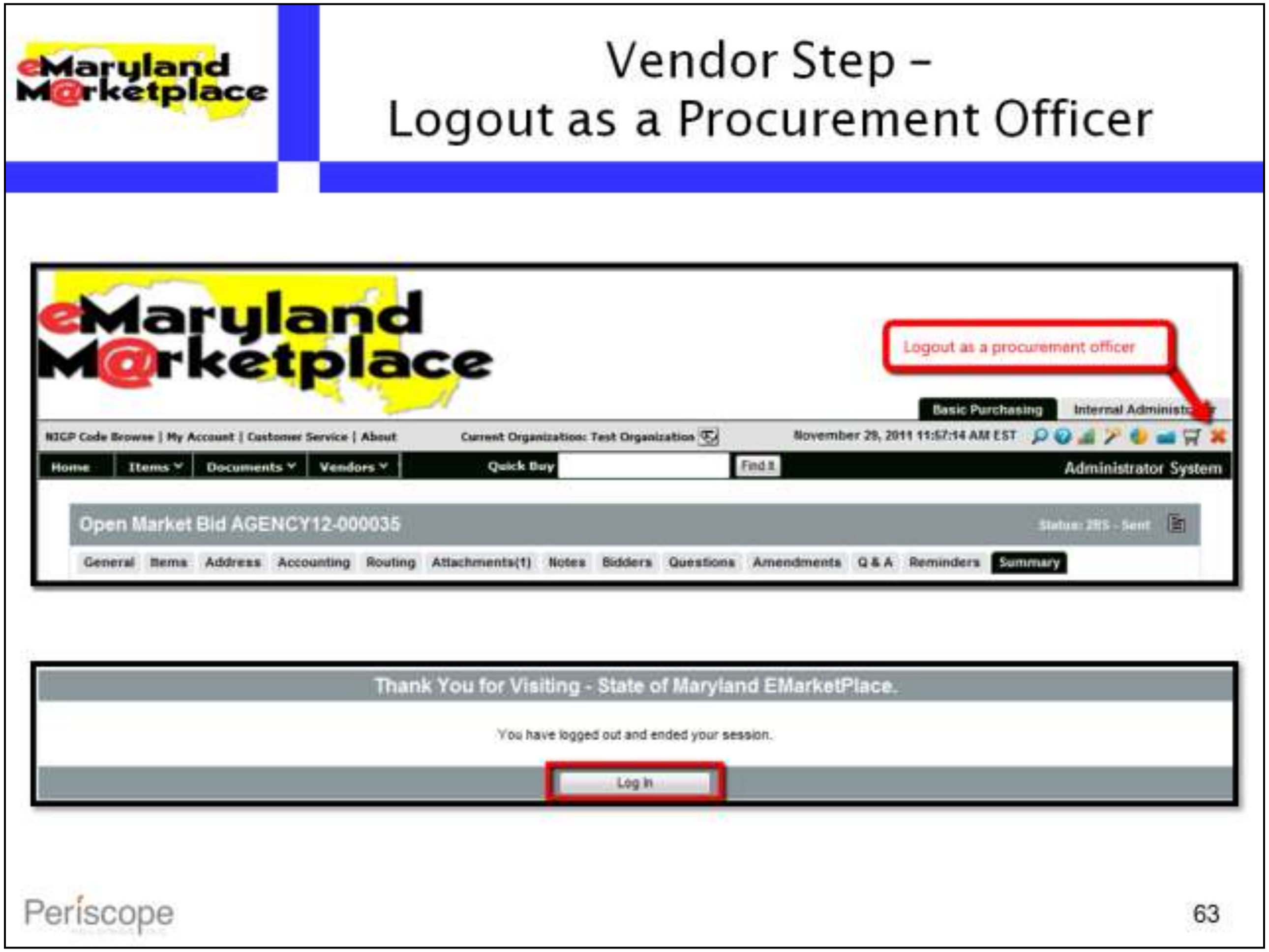
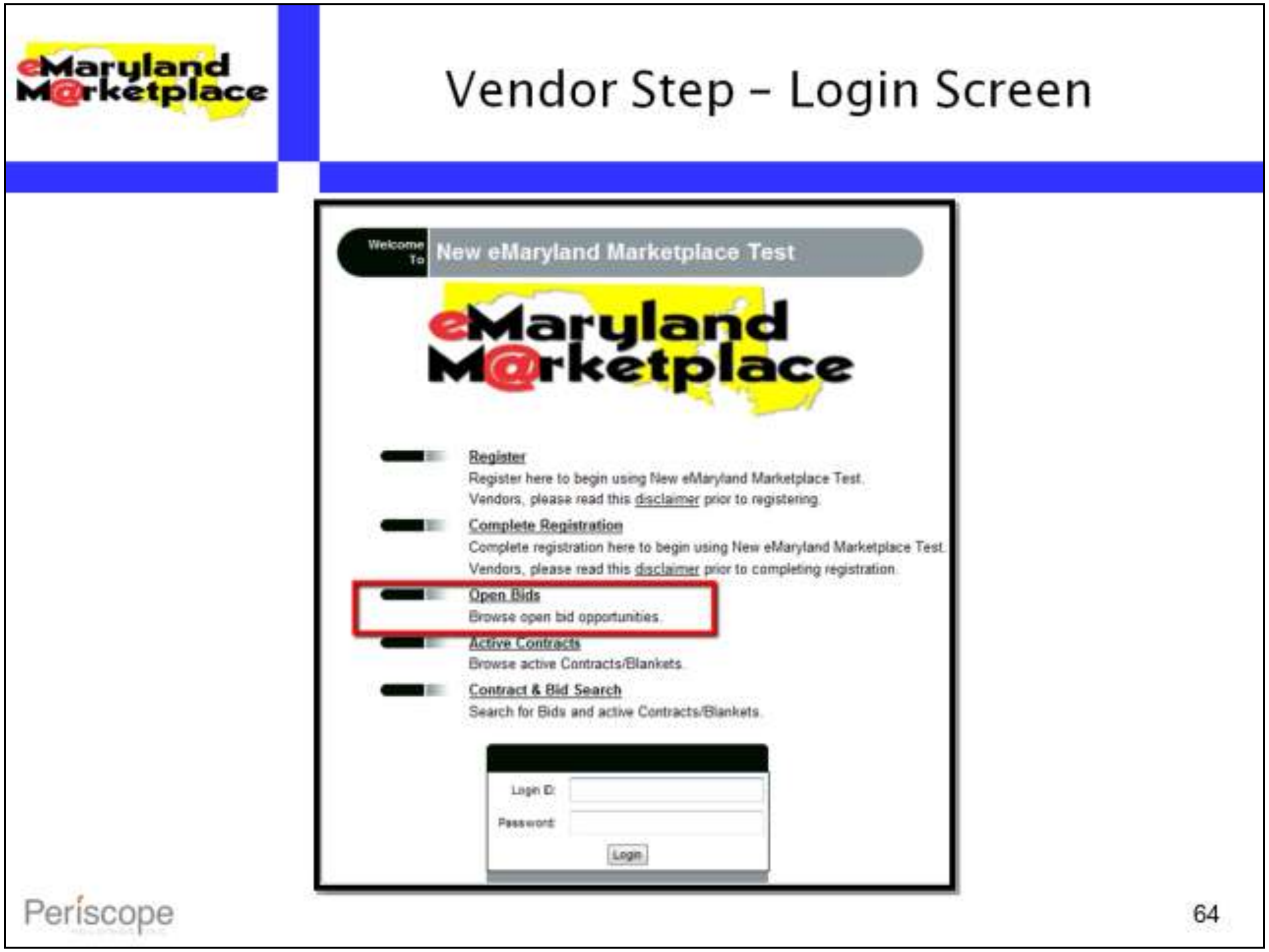
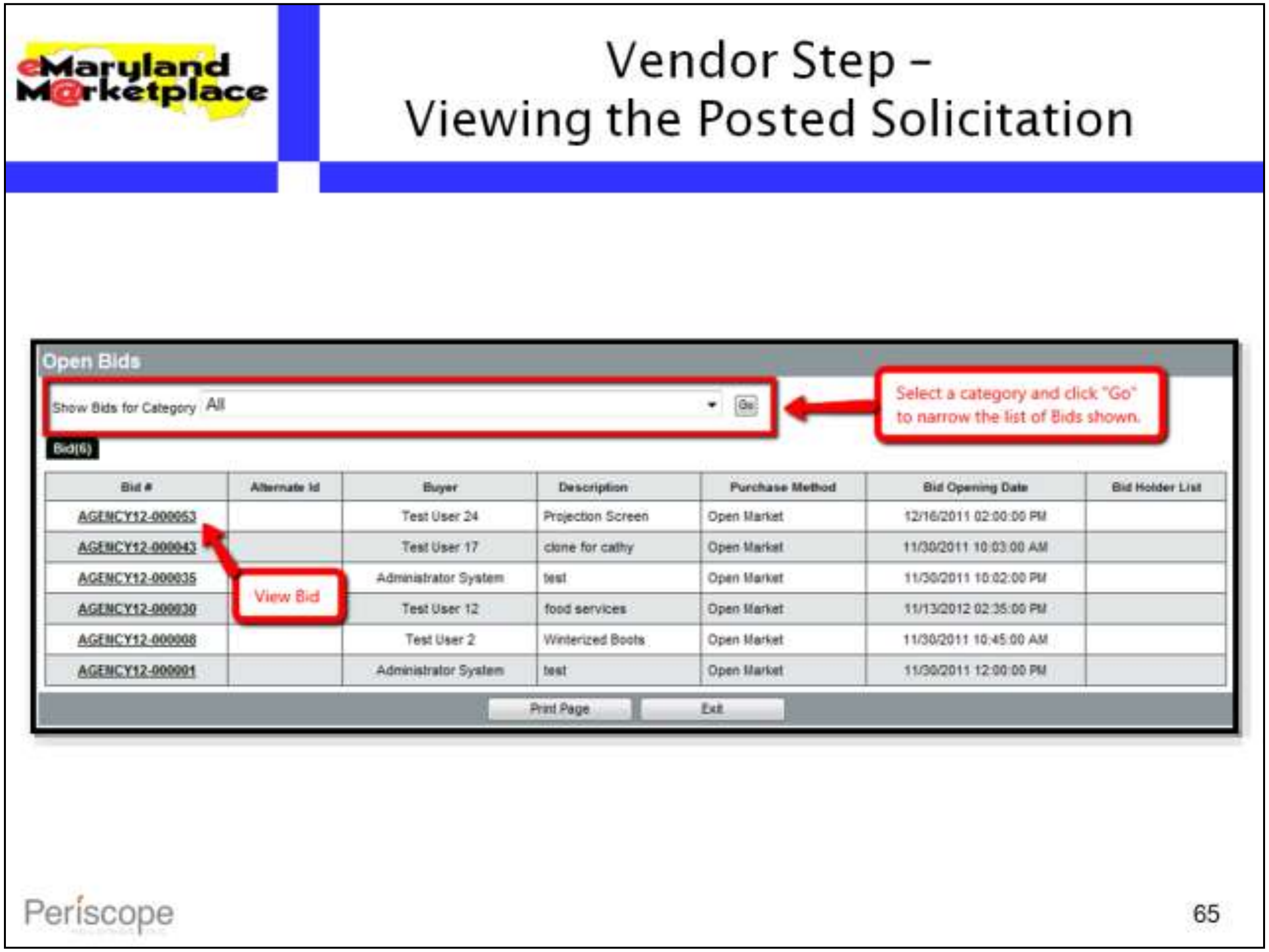


Before you can complete the Vendor Step, you must first log out from eMaryland Marketplace in your current role as a Procurement Officer. Click the red **X** icon in the Navigation tool bar to logout. Next, click the **Log In** button to return to the eMaryland Marketplace Login screen.



If you selected “Open Bid” as the **Bid Type** for your Bid, it can be viewed by vendors and the public without logging in by clicking the **Open Bids** link on the eMaryland Marketplace login screen.

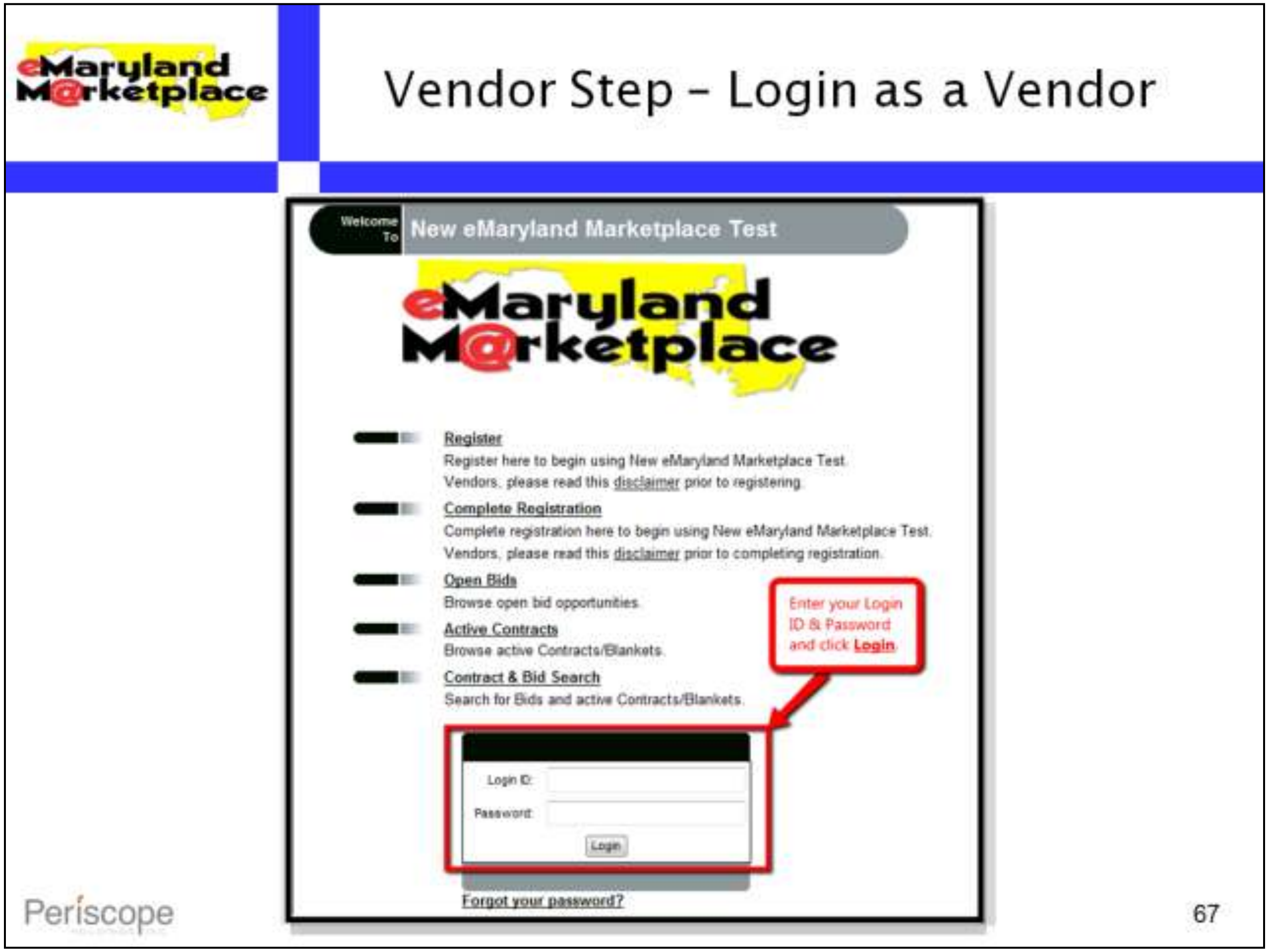


Clicking the **Open Bids** link displays a screen on which all posted solicitations are listed in order of published date, starting with the most recent. Open Bids are those where the Basic Purchasing user has allowed any vendor to submit a reply, not just those notified when the Bid was published.

The list can be narrowed by selecting a commodity category in the **Show Bids for Category** dropdown and selecting **Go**. Clicking on the link in the **Bid #** column will display the Bid.

Upon selecting a Bid to view from the Login Screen, users will be displayed the **Acknowledge Receipt and View Solicitation** screen. This screen displays a message configured by state administrators to communicate that in order for vendors to be added to the Bid Holder List and respond to the Bid, they will need to login. In order to just view the Bid however, you can click **Proceed**.

Upon clicking **Proceed**, a modified version of the Summary tab will display, allowing users to view the Bid and open any attachments.



Click the **Exit** buttons on the bottom of the screen until back on the eMaryland Marketplace Login screen. Now you can login as a vendor user. You can use the following information:

Login ID – vendor

Password – passw0rd

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Vendor Step – Finding the solicitation

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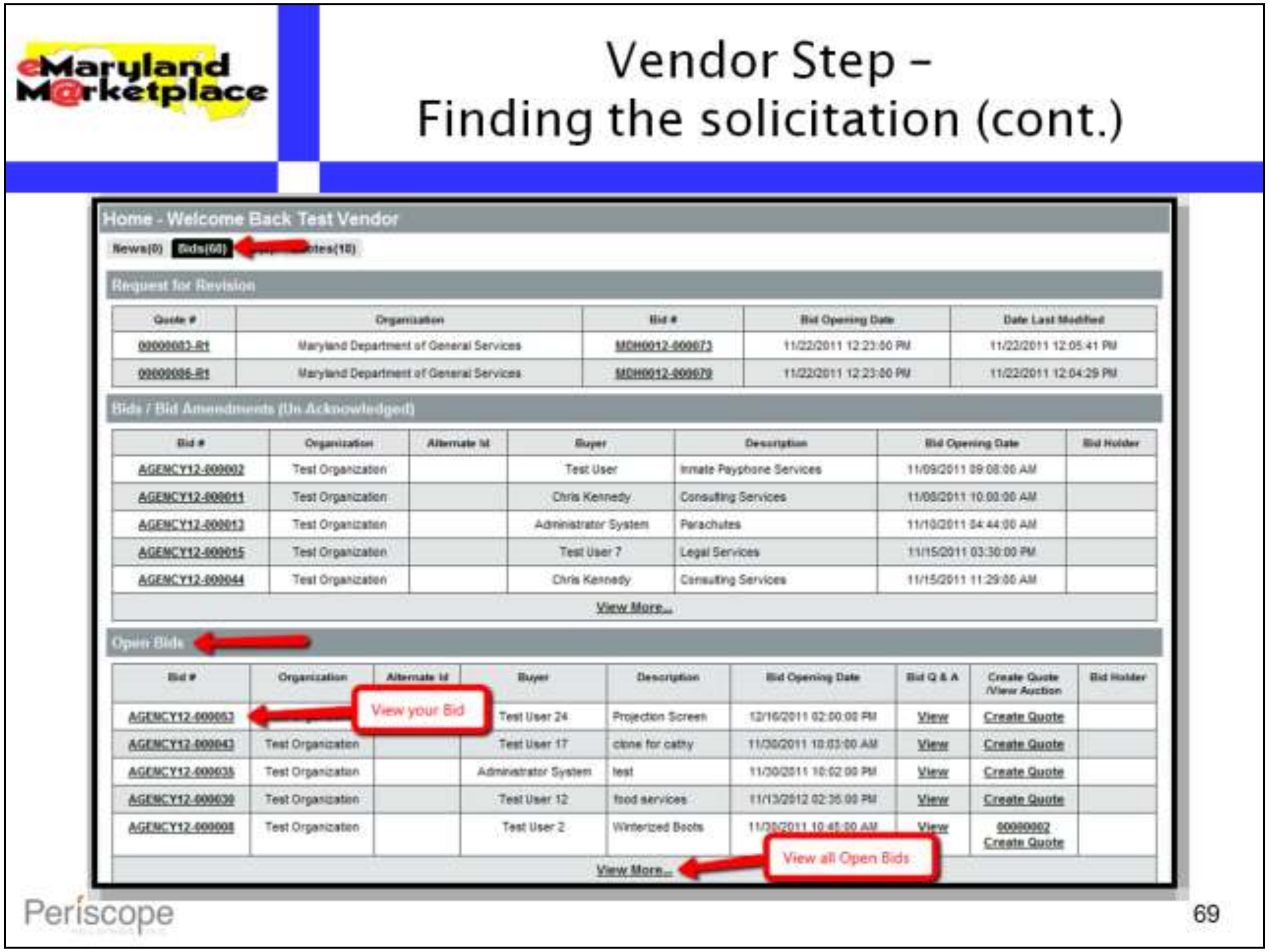
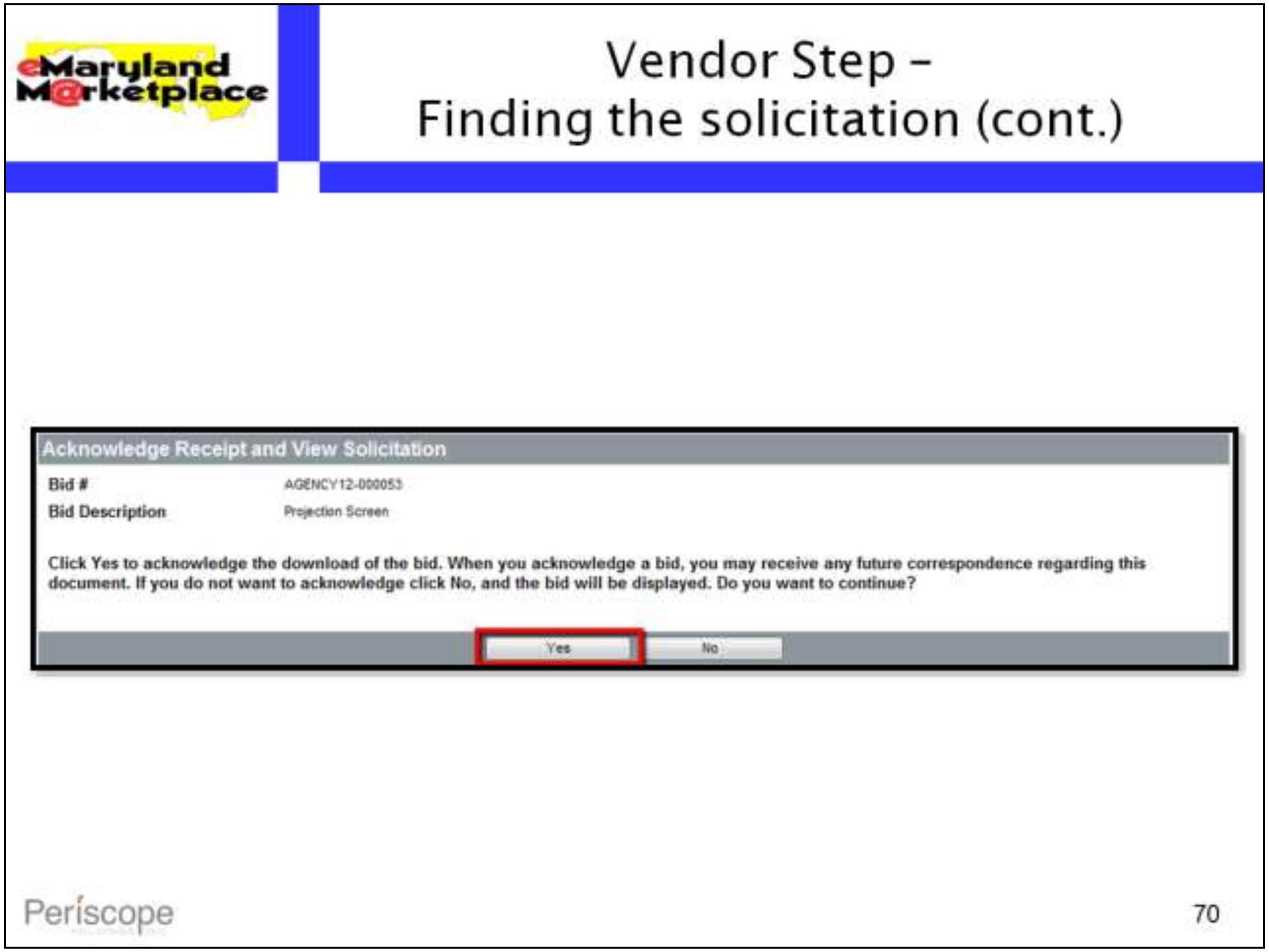
Upon logging in as a vendor, the vendor Home screen will appear as well as the same two toolbars visible to State users when logged in. Note that the Header toolbar contains the same official system clock that is used to timestamp documents and to regulate Bid Available and Opening times.

To find your solicitation to respond to, click the **Bids** tab in the Home area of the screen.



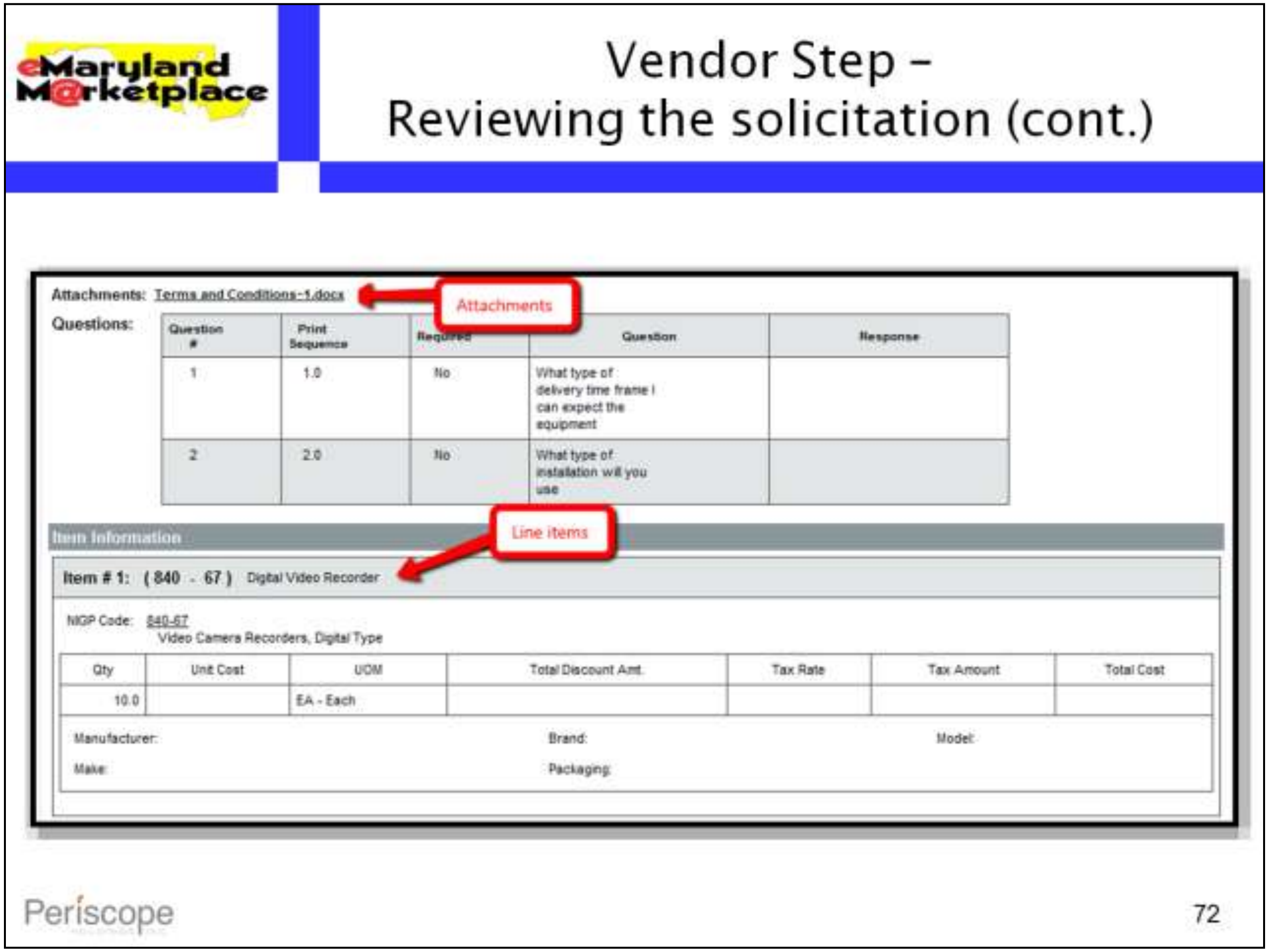
The third section on the Bids tab for vendors is labeled **Open Bids**. The **Open Bids** section displays a list of the Bids for which the vendor is able to respond, meaning that they have not yet reached their Bid Opening Date (or due date), and that either the Bid allows any vendor to respond, or that if not, this vendor was on the bidders list.

Find your Bid in this section and click the link in the **Bid #** column



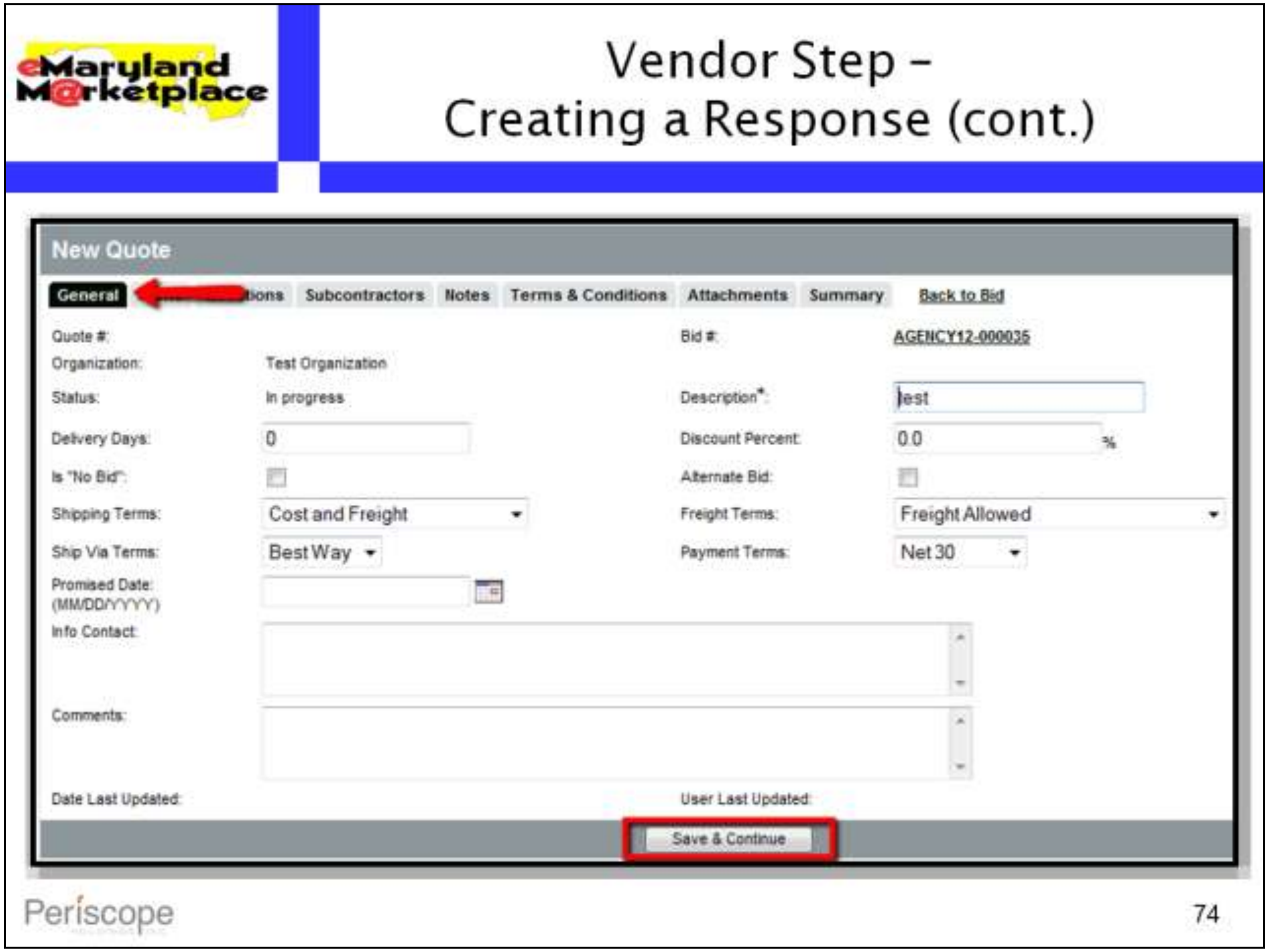
Upon selecting a Bid to view, the vendor is displayed the **Acknowledge Receipt and View Solicitation** screen, which allows the vendor to acknowledge the Bid. By clicking **Yes** on this screen, the vendor will be placed on the Bid Holder List, receive any future correspondence regarding the Bid, and be displayed the Bid. By clicking **No**, the vendor will just be displayed the Bid.

Once the Bid appears, it can be reviewed. In the Header Information section, the **Bid Opening Date**, **Allow Electronic Quote**, **Pre Bid Conference** and **Bulletin Description** fields are among those that should be reviewed.



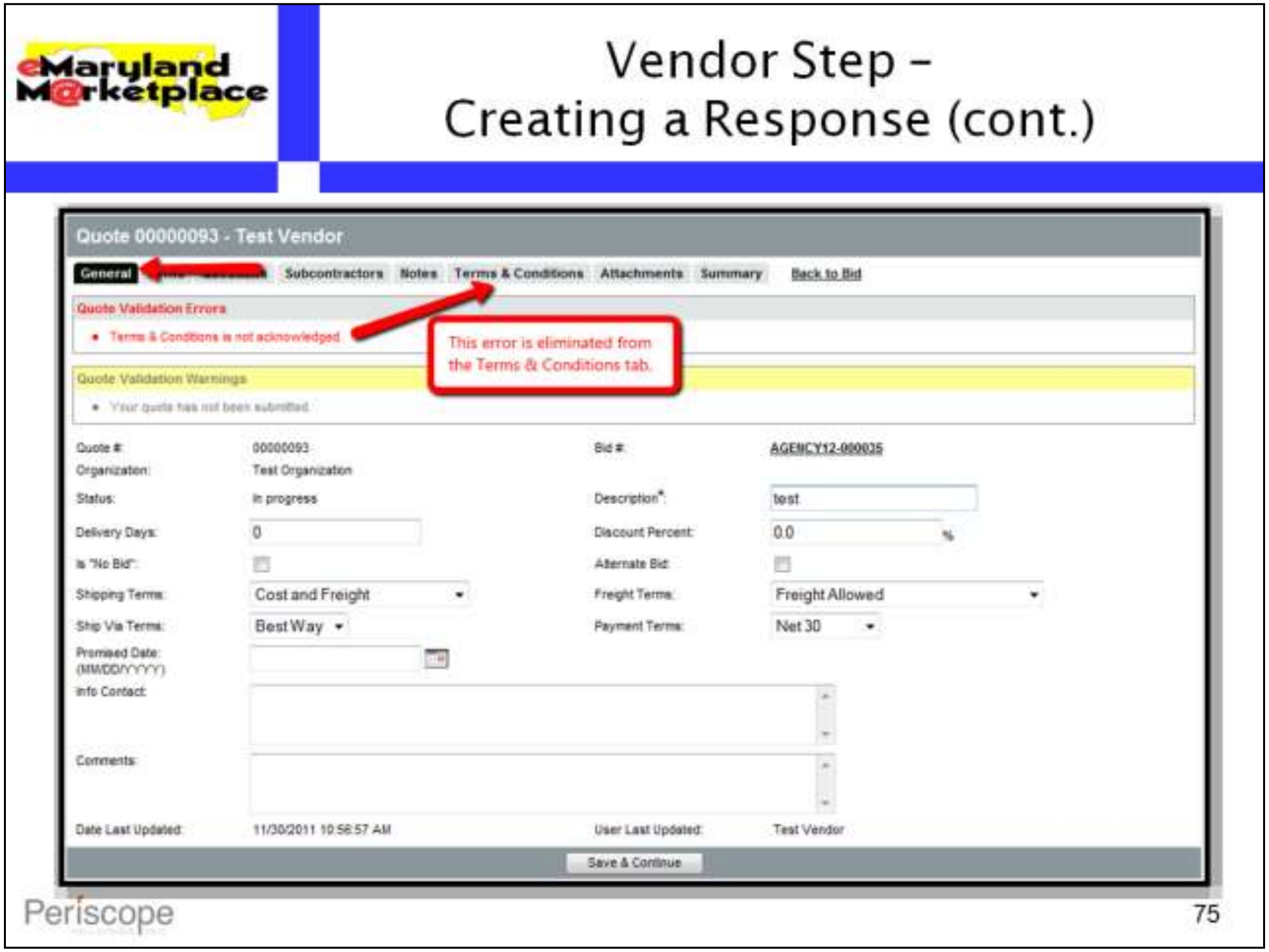
On the bottom half of the Bid document, the **Attachments**, **Questions**, and **Item Information** fields are among those that should be reviewed.

Vendors are able to respond online to Bids by creating and submitting a Quote document prior to the Bid Opening Date you assigned to the Bid. On the bottom of the Bid document, click the **Create Quote** button to create an online response to the solicitation.



Upon click **Create Quote** the General tab of a New Quote document will appear. The process for completing a Quote mimics the process for Bids and other documents in ProcureAZ. The user must work through the tabs along the top, completing all required fields before submitting the document from the Summary tab. Before the Quote is assigned a number and can be accessed later, the vendor must first complete the General tab. All required fields on this tab come pre-completed, so all the vendor must do is click **Save & Continue**.

The other fields on the General tab allow the vendor to input their desired shipping, freight and payment terms, the expected delivery days for any goods being solicited, including a promised date, any standard discount percentage that would apply to all items on the Bid, their contact information and any other comments regarding the Quote. Two check boxes also appear. **Is "No Bid"** denotes that the vendor's response is that they are not bidding on any of the items. **Alternate Bid**, when checked, means that the vendor has submitted another Quote, and that this Quote is meant to be an alternative.



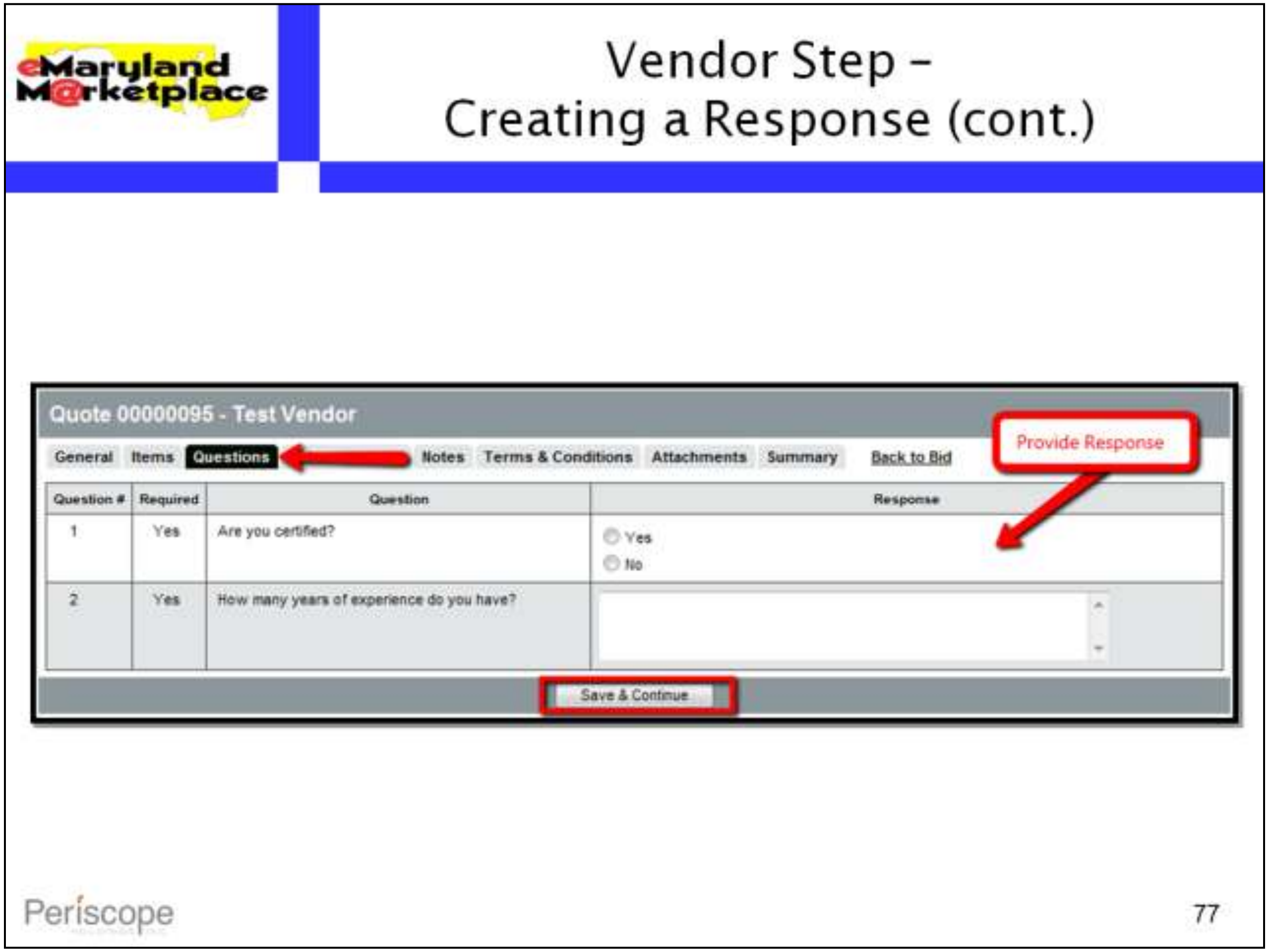
Upon clicking **Save & Continue** on the General tab, the screen will refresh and a validation error will appear along the top of the screen that the vendor has yet to acknowledge the Terms & Conditions. Vendors are able to do this from the Terms & Conditions tab.

Next, proceed to the Items tab.

The next tab over is the Items tab which enables the vendor to provide a price quote for each of the items you setup on your Bid. In addition, vendors are able to provide any standard discount percentage for each item, enter applicable freight charges per item, and provide an **Alternate Description** of each item, if they don't offer what's been described.

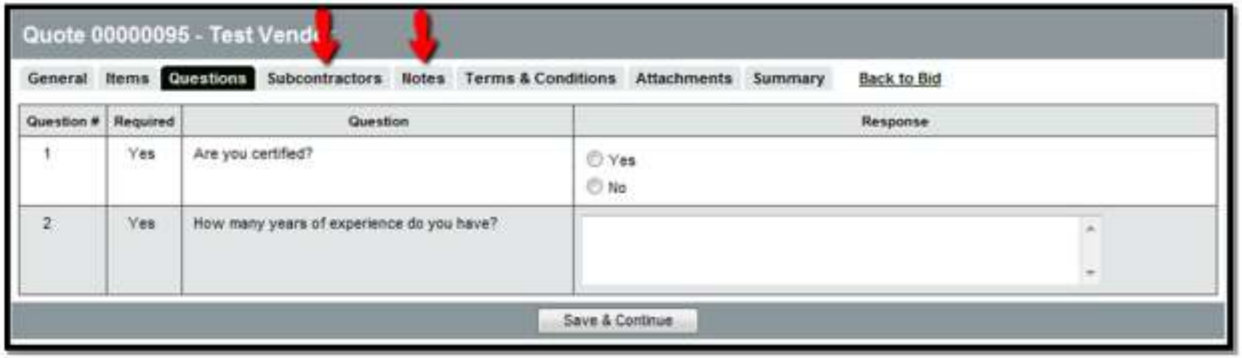
REMINDER: If **Alternate Descriptions** are not allowed, the line item description should have information indicating this.

The **No Bid** check box is automatically selected until the vendor provides a price quote for an item, at which point it is un-selected. Selecting the **No Charge** check box indicates that the vendor provides the item free of charge. Enter a **Unit Cost** for all items and click **Save & Continue** below.



The next tab to view is the Questions tab. If you went through the optional step of setting up Questions, the Questions tab is where any questions that you setup on the Bid can be answered by the vendor. If you made any questions required, vendors will not be able to submit their online response until they have provided an answer. Vendors answer questions by choosing from the available options or entering data in any text fields if provided and selecting **Save & Continue**.

Vendor Step – Creating a Response (cont.)



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The Subcontractors and Notes tabs will not be applicable on most Quotes for vendors at this stage. The Subcontractors tab will only display data if you specified on your Bid that certain rules for subcontractors, either regarding their business classification, or their award percentage. Vendors will be directed to review your attachments for sub-contractor related information.

The Notes tab enables vendors to input internal notes, just like the Notes tab on the Bid document. Only other users for this vendor accessing this Quote will be able to see these notes.

The Terms & Conditions tab displays a list of all the files you attached to the Bid, which can be downloaded and/or viewed by clicking the link in the **File Name** column. Before vendors are able to submit their Quote, they must select a button option indicating their acceptance of the Terms & Conditions of the Bid.

Selecting either **Yes with exceptions** or **No** will require that the vendor input text in the field below explaining their exceptions to the Terms & Conditions.

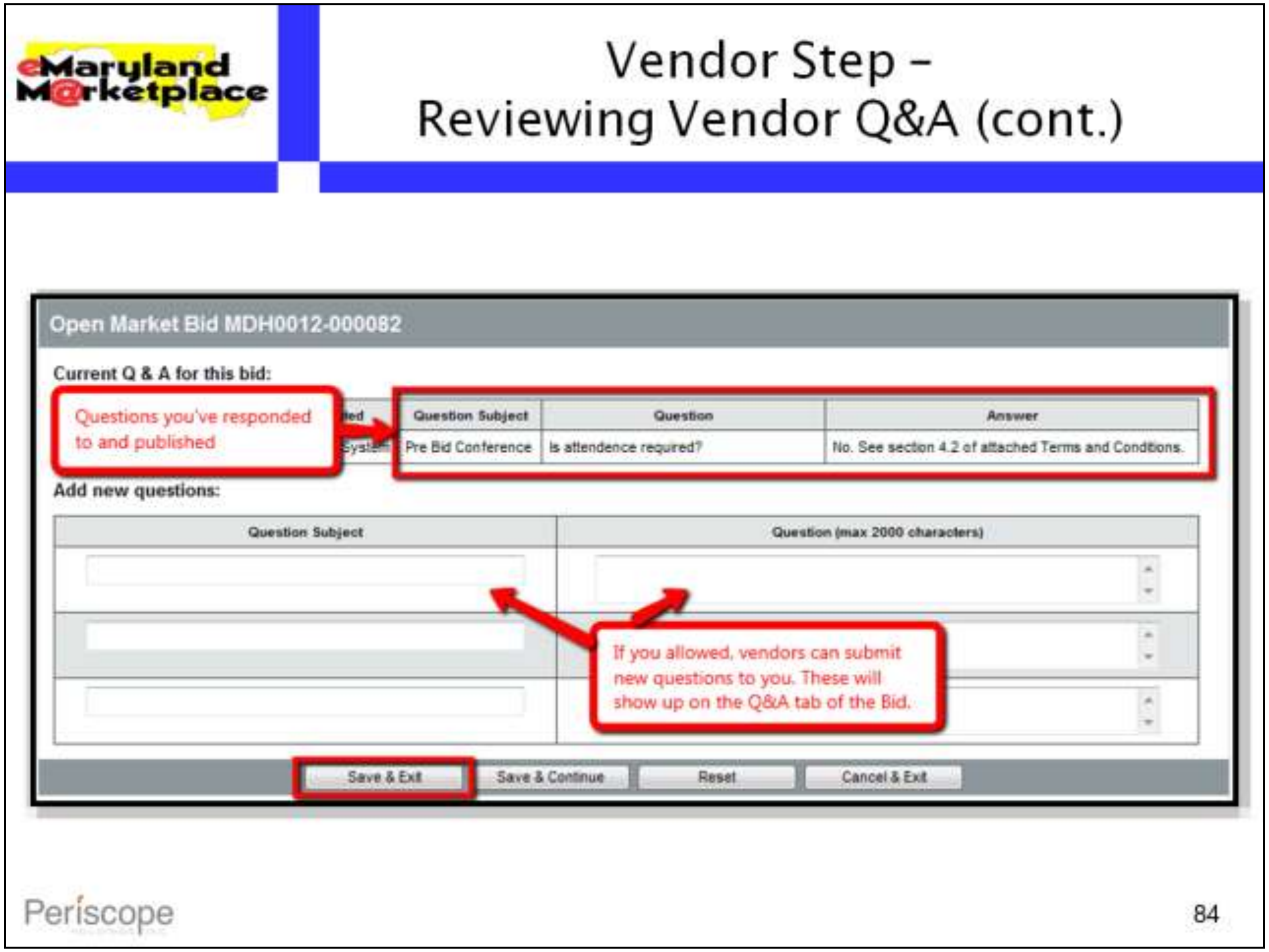
The Attachments tab on the Quote document enables the vendor to attach relevant files to the Quote document to include as part of their response. The process for attaching files to a Quote mimics the process for Bids. After attaching a document, vendors have the ability to delete any previously attached document, as well as mark any of their attached files as confidential. Clicking the check box in the **Confidential** column next to an attachment will ensure that it is only visible to authorized logged in users from your agency, and not public users from the Login screen.

From the Summary tab, the vendor can view all of the information they input on their Quote document. Along the bottom of the screen, button options exist allowing the vendor to **Print**, **Submit**, and **Cancel** their Quote. Once submitted, the vendor can withdraw it at any point up until the Opening Date you chose for the Bid. In order for the Quote to be considered for award however, the vendor must make sure the Quote is submitted prior to the Bid Opening Date/Time.

After clicking **Submit Quote** the yellow warning message along the top of the Quote Summary tab will disappear. The status of the Quote will update to “Submitted.” The response is now submitted.

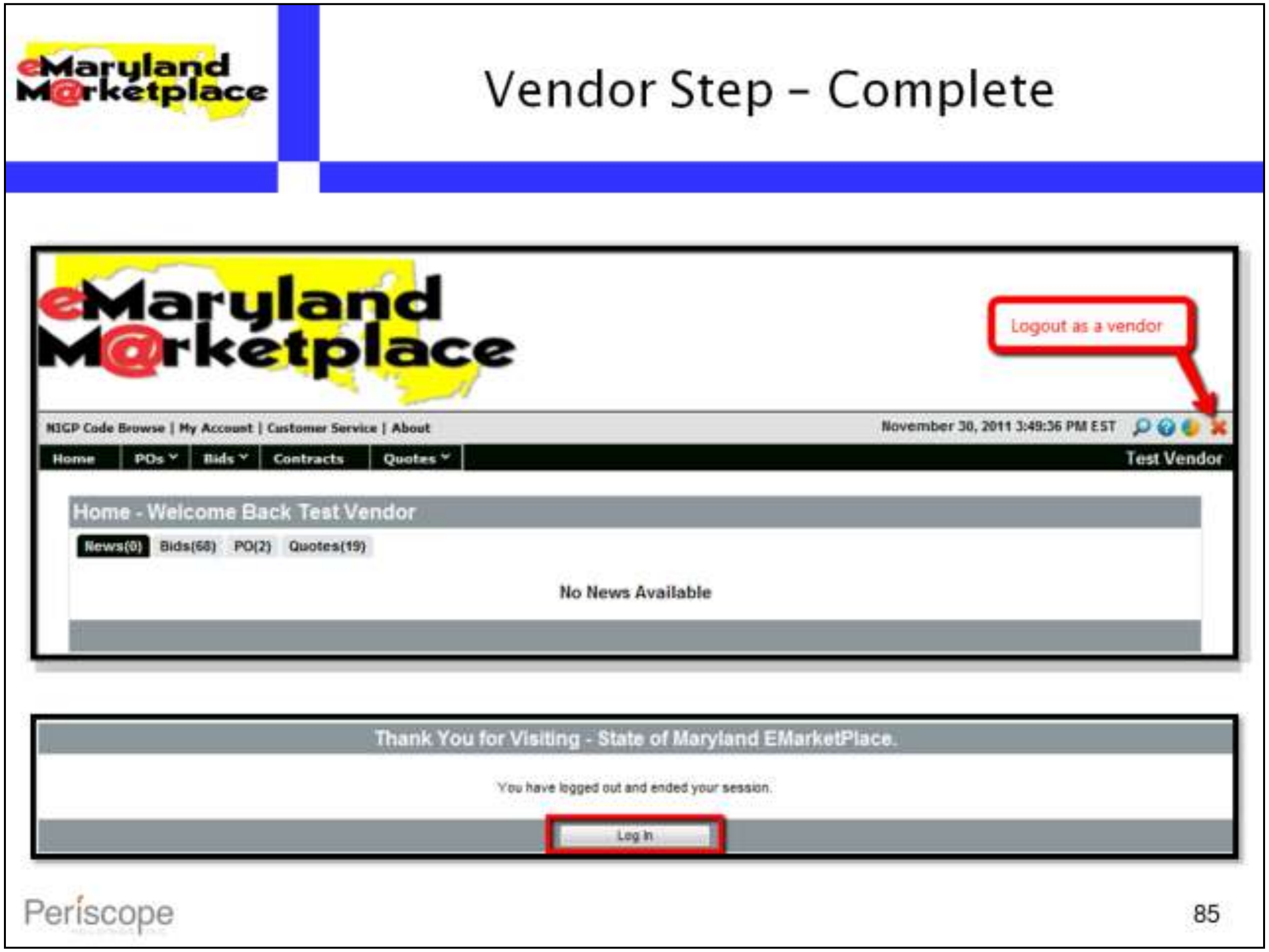
Next, click the **Back to Bid** link to return to the Bid document you posted and scroll down to the bottom of the screen.

On the bottom of the Bid screen, a **Bid Q & A** button will appear allowing the vendor to access any vendor questions and your answers that you have published.



After clicking the **Bid Q&A** button, the vendor can view any questions that you have posted and responded to via the Q&A tab on your Bid. If you selected to allow vendors to submit questions on the Q&A tab, an **Add new questions** section will appear enabling the vendor to ask you questions that will appear on your Bid's Q&A tab to answer.

To try out this feature, enter a **Question Subject** and **Question**, then click **Save & Exit**.



The Vendor Step is complete once you have logged out as a vendor and returned to the eMaryland Marketplace Login screen.

You can now proceed with the Step 8 – opening and reviewing the solicitation responses.

Step 8

Opening and reviewing the solicitation responses

Step 8 – Checklist

- ☐ Access and review the Bid document
- ☐ Create an addendum (for training)
- ☐ Open and review solicitation responses

Step 8 – Accessing the Bid

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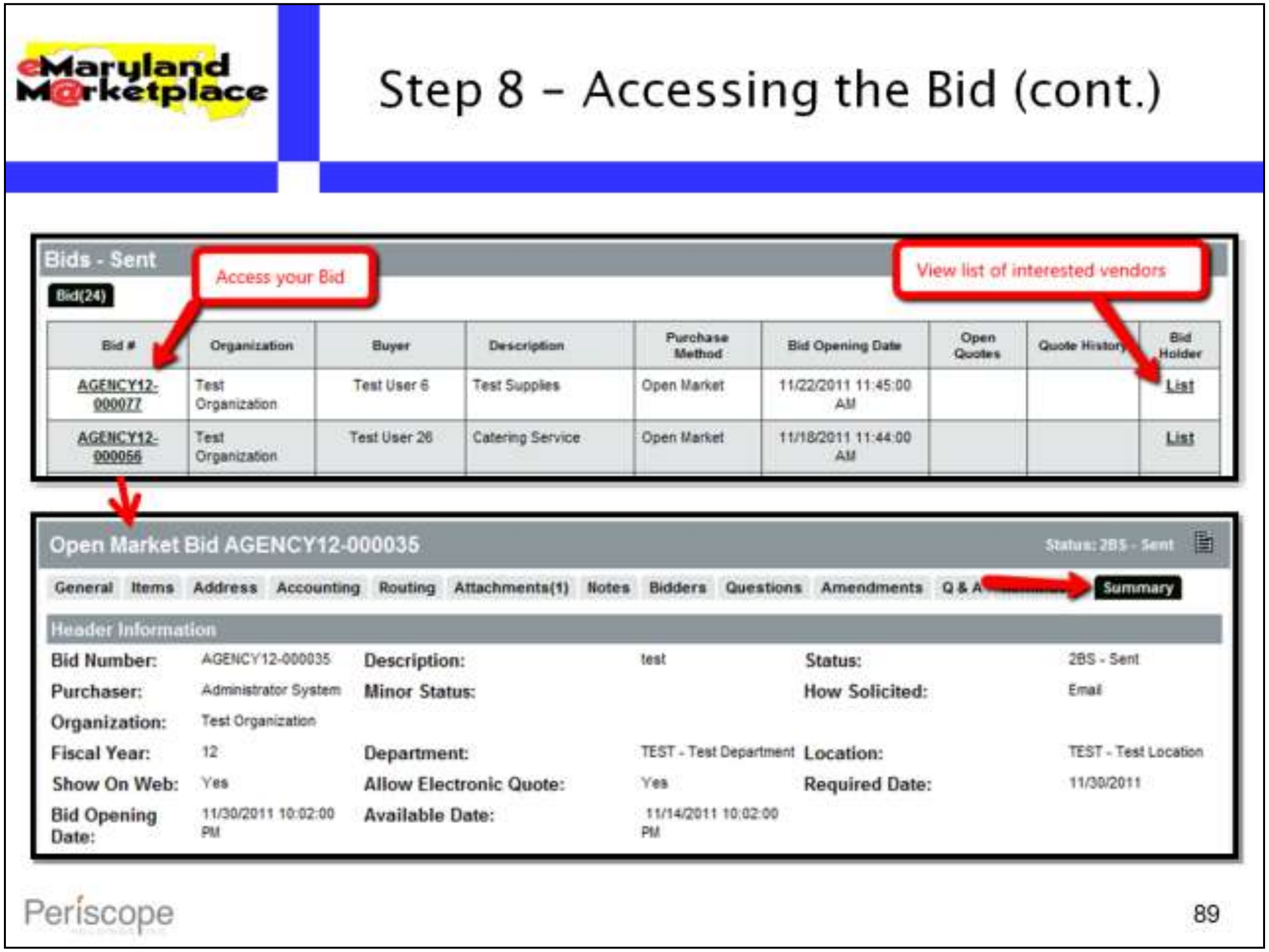
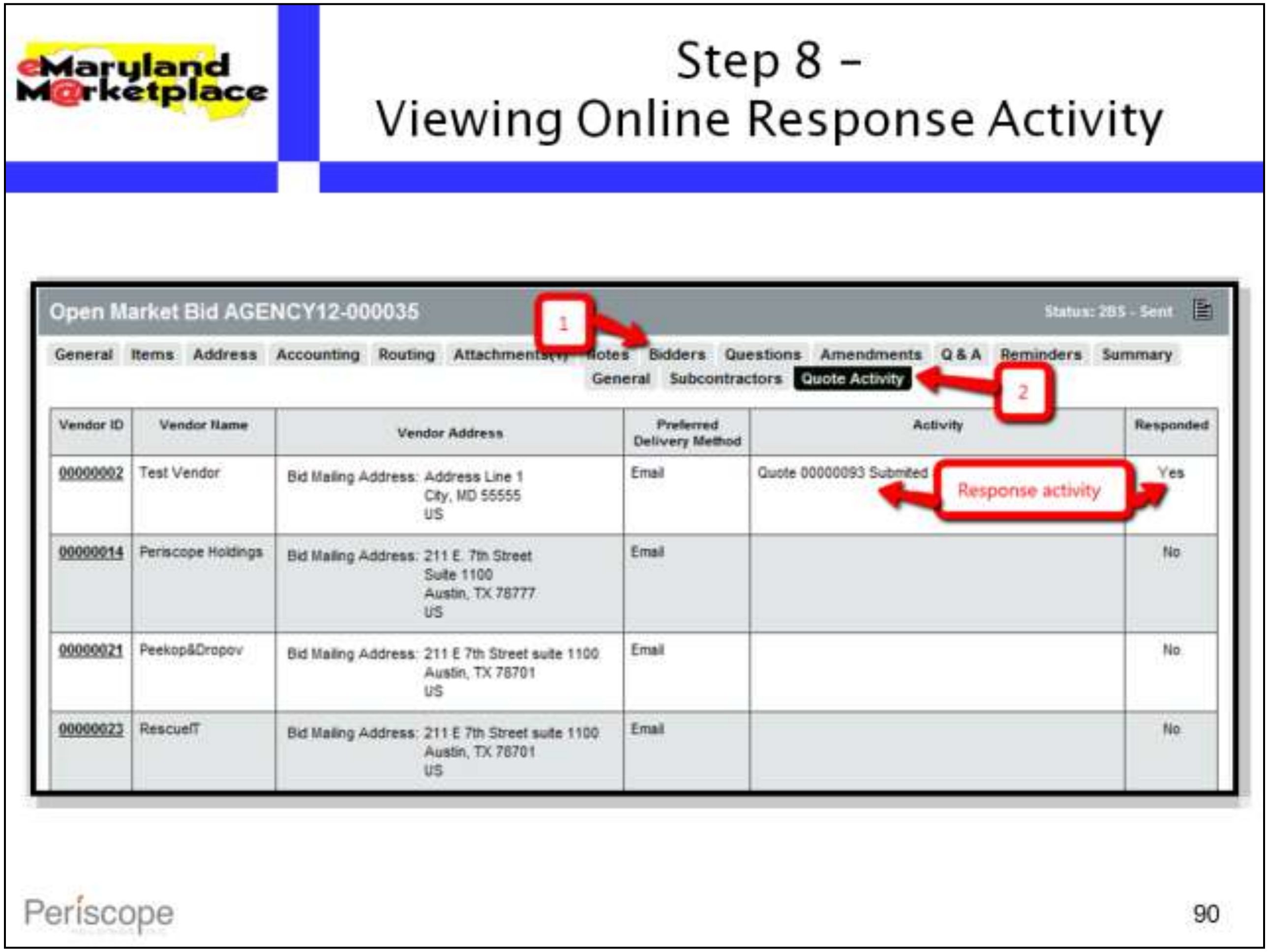
While your Bid is available for response, it is in "Sent" status. During this status, no action regarding the document is required on your part. Therefore, the Bid document is not available via one of the tabs on your Homepage. Instead, to access the Bid, use the **Documents** dropdown from the Navigation toolbar. Hovering your mouse over **Bids** will display a list to the right of all available statuses of that document. Select **Sent** from this list to view your "Sent" Bids by the most recent.

Bids in "Sent" status allow four primary actions, including viewing the vendors that have acknowledged receipt of the Bid and responded, managing Q & A regarding the solicitation, creating and applying amendments to the solicitation, and opening the Bid to view the submitted responses once the Opening Date has been reached.



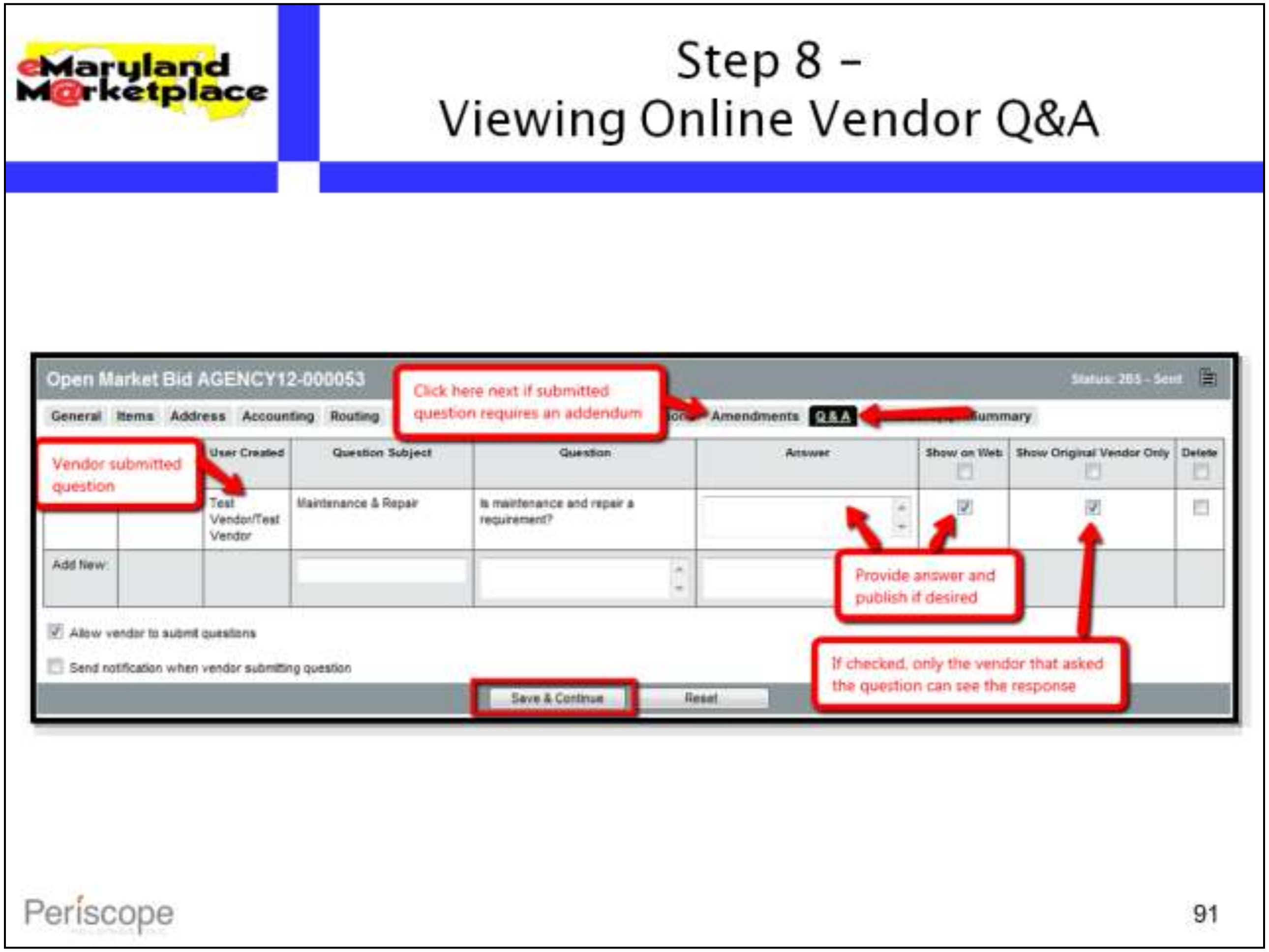
Once the list of Bids in “Sent” status displays, you can click the link labeled “List” in the far right **Bid Holder** column to view a list of the vendors that have acknowledged the Bid and are interested in potentially responding.

Clicking the link in the far left **Bid #** column for your Bid will display the Summary tab of the document.



Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method	Activity	Responded
00000002	Test Vendor	Bid Mailing Address: Address Line 1 City, MD 55555 US	Email	Quote 00000093 Submitted	Yes
00000014	Periscope Holdings	Bid Mailing Address: 211 E. 7th Street Suite 1100 Austin, TX 78777 US	Email		No
00000021	Peekop&Dropov	Bid Mailing Address: 211 E 7th Street suite 1100 Austin, TX 78701 US	Email		No
00000023	RescueIT	Bid Mailing Address: 211 E 7th Street suite 1100 Austin, TX 78701 US	Email		No

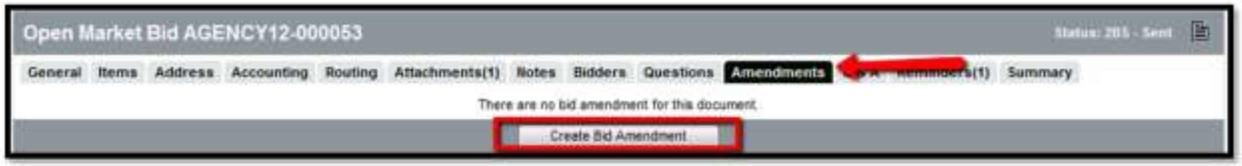
In addition to being able to see the interested vendors via the Bid Holder List, you can also view the online response activity in real-time. This can be viewed by first clicking the Bidders tab, then the Quote Activity tab underneath it. The **Activity** and **Responded** columns next to each vendor display every online response submission and withdrawal, and if they've submitted a response, respectively.



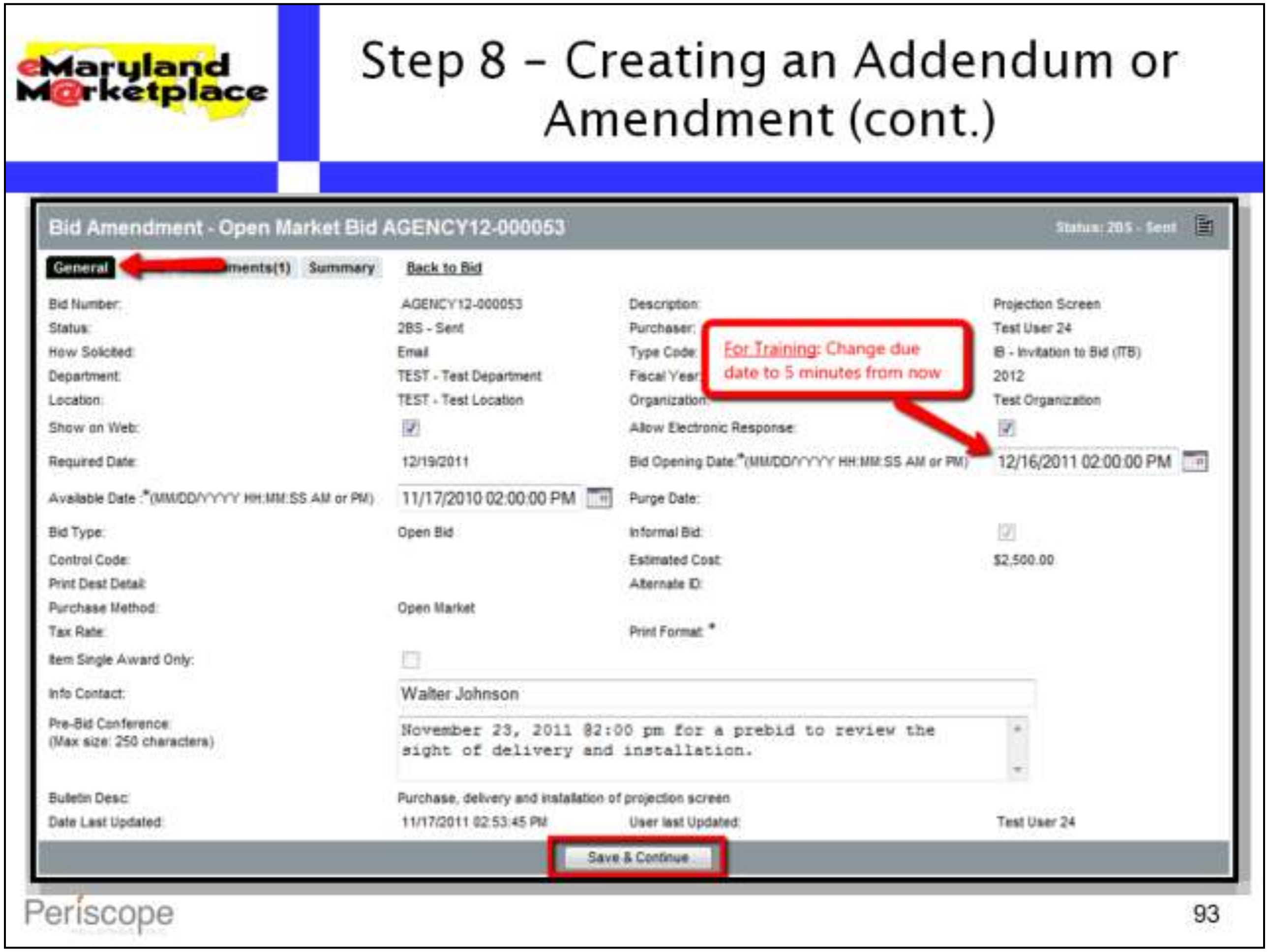
Following the publishing of your Bid, if you allowed vendors to submit questions online through the new eMaryland Marketplace, these questions will show up on the Q&A tab of your Bid document. You can also document questions you have received from vendors outside they system from the Q&A tab if desired.

Complete all of the fields shown to document a question and answer yourself. To answer a question submitted online by a vendor, just complete the **Answer** field, then decide whether to publish it. If just **Show on Web** is checked, then any vendor can see this Q&A. If **Show Original Vendor Only** is also checked, only the vendor that submitted the question can see your response.

Step 8 – Creating an Addendum or Amendment

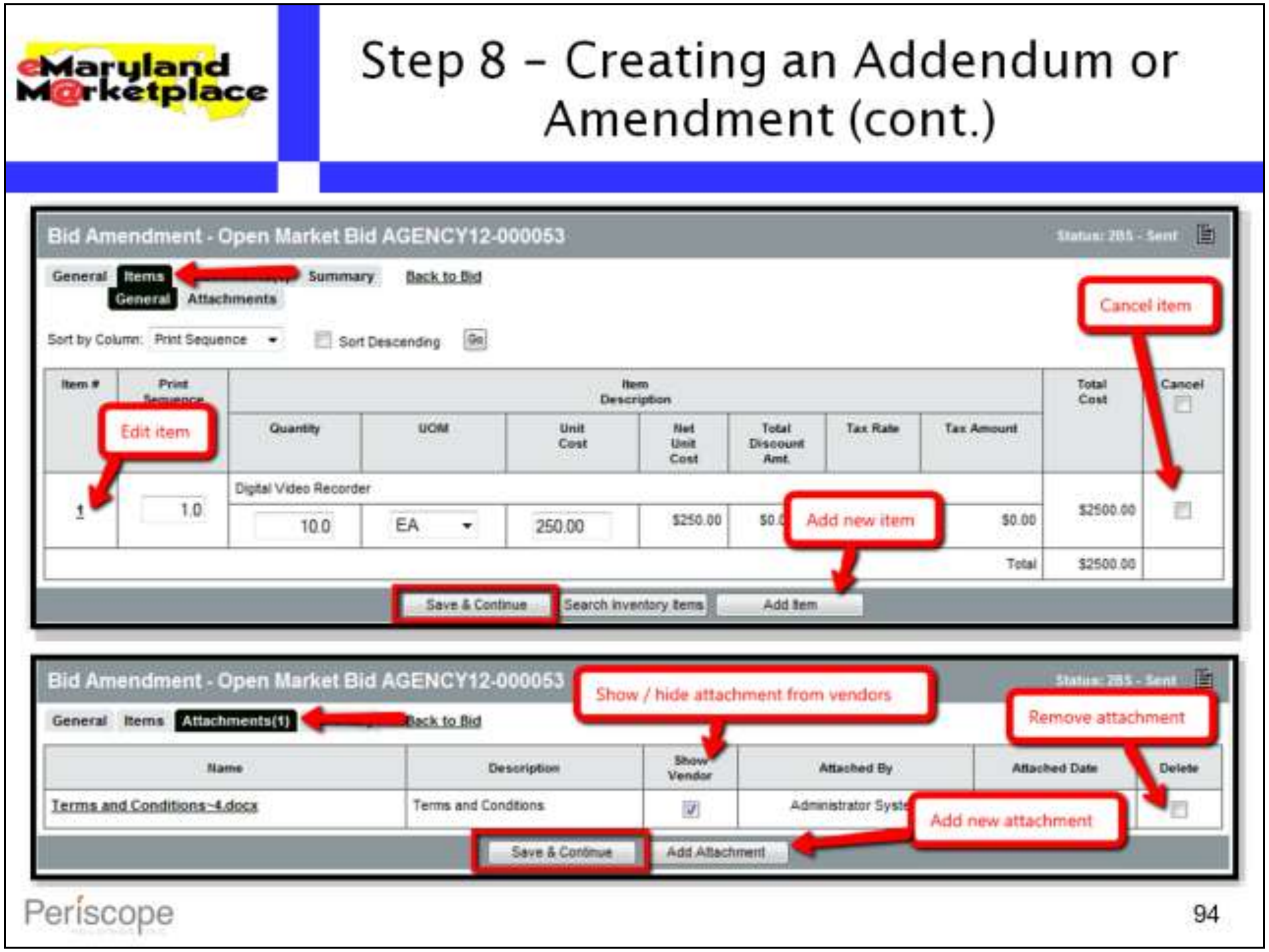


If a vendor question or other issue requires that an addendum or amendment to the solicitation be performed, click the Amendments tab. From here you'll be able to view any previously completed amendment as well as create a new amendment by clicking the **Create Bid Amendment** button.



Creating a new Bid Amendment will display a copy of the Bid, but with only four tabs available to be edited.

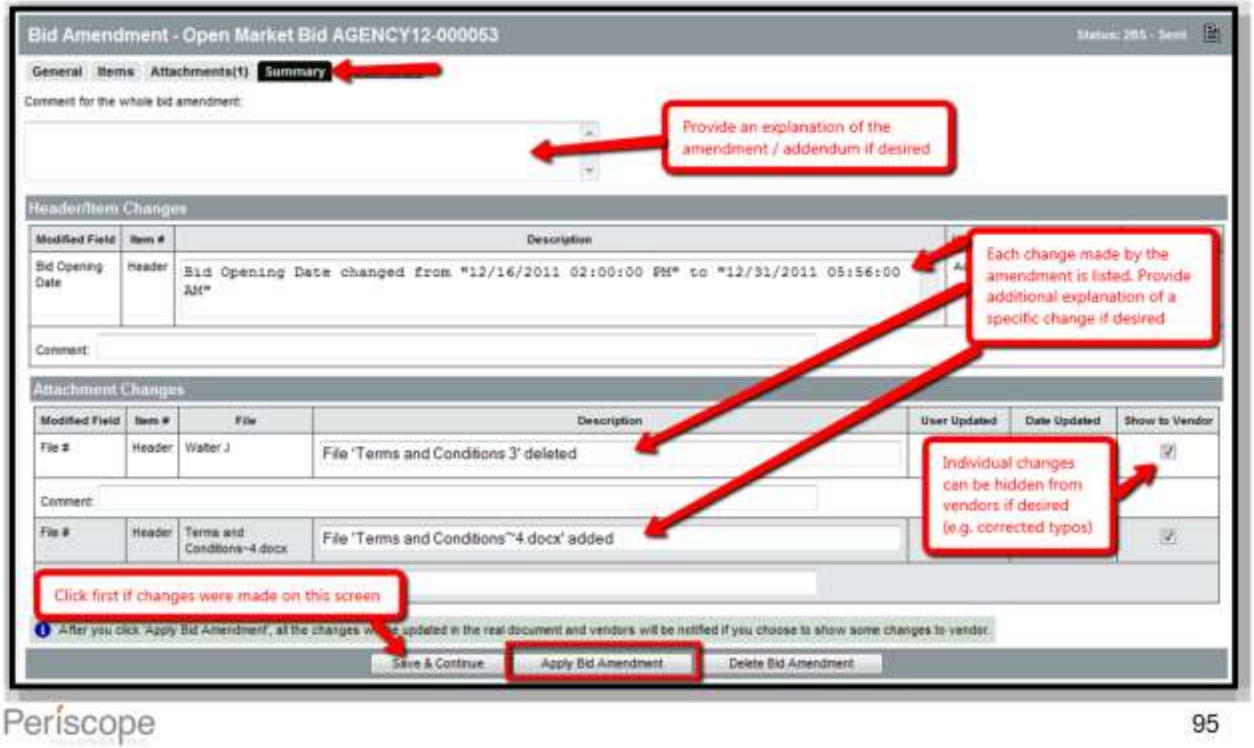
You'll initially be shown the General tab, which only allows you to edit the **Show on Web**, **Allow Electronic Response**, **Bid Opening Date**, **Bid Available Date**, **Info Contact**, and **Pre-Bid Conference** fields. If any changes are made, click **Save & Continue** before proceeding through the remaining tabs.



The only other tabs on the Bid that allow amendments are the Items and Attachments tabs. On the Items tab, all information regarding every item can be edited using the same process as during the item setup process. Items can also be added and cancelled.

On the Attachments tab, attachments can be added or deleted. You can also edit whether attachments should be shown to vendors. Once done building your amendment, click on the Summary tab to review your changes, add any additional information and apply your changes.

Step 8 – Creating an Addendum or Amendment (cont.)



On the Summary tab of your Bid Amendment, a list of each change that was made on the previous tabs displays. Within the **Description** column, an explanation of each change appears. This explanation is editable if you'd like to provide additional detail. A **Comment** field also exists along the bottom of each listed changed, enabling you to further explain any amendment. A global comment field is also available along the top of the Summary tab so that you can provide information regarding the entire amendment, if desired.

To the far right of each change a **Show to Vendor** check box allows you to decide whether to inform vendors about the change. Amendments processed to fix typographical errors are an example of changes that may not need to be sent to vendors. By default, vendors will be informed of all changes however. If you make any changes on this screen, ensure that you select **Save & Continue** before applying the Amendment. Once happy with the changes, click **Apply Bid Amendment**. The changes will be immediately reflected on the Bid.

Step 8 – Creating an Addendum or Amendment (cont.)

Vendor Notification Result

Subject: Bid Amendment Notification - Bid # ADSPO10-00000113, AutoGSD Architecture Subscription Renewal

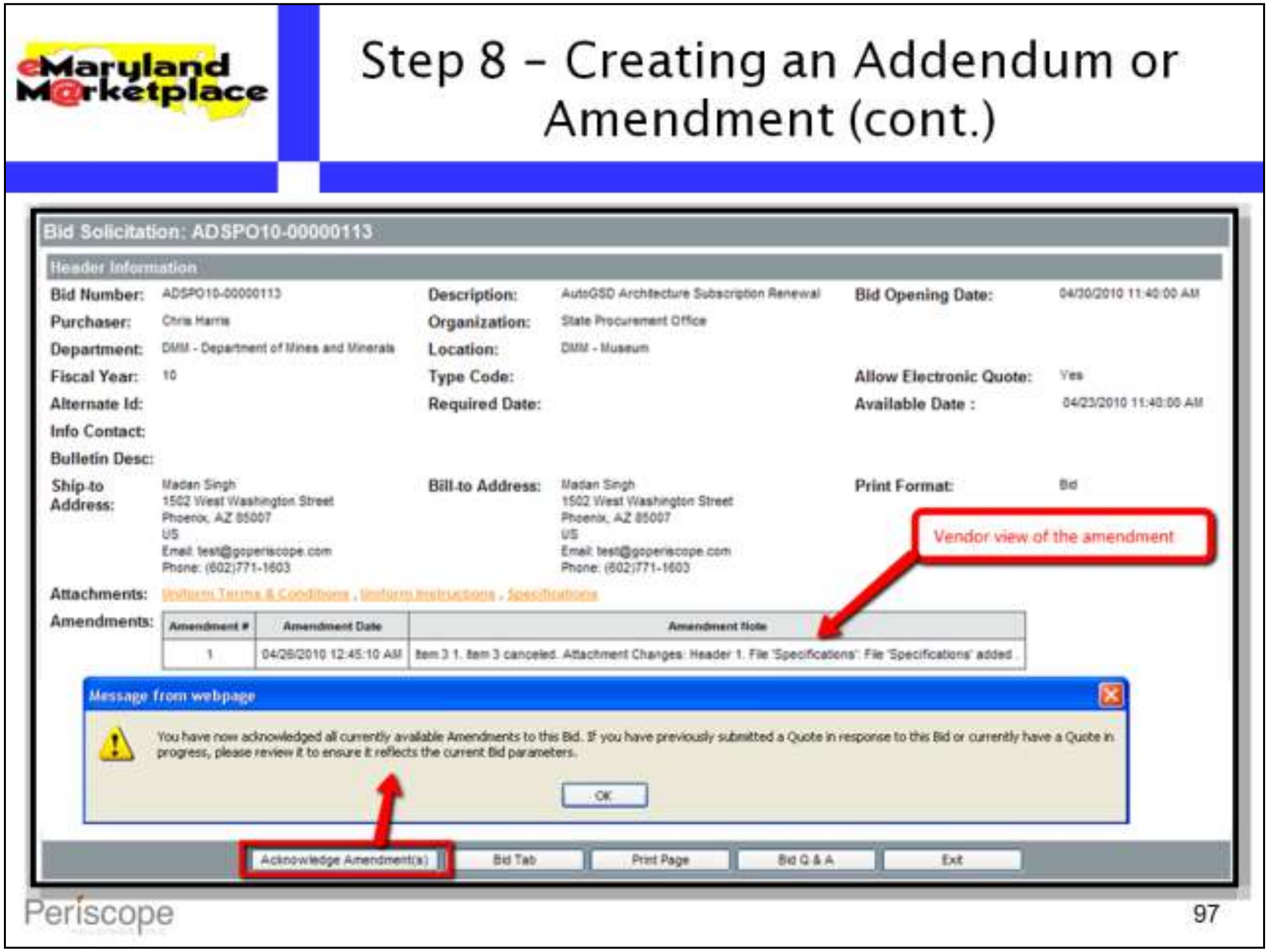
Email Recipients

Delivery Date: 04/26/2010 12:45:10 AM

Vendor ID	Vendor Name	Email Address
000000525	W.T. Cox Subscriptions	Amanda Danford (test@goperiscope.com)
000004101	The Wilkins Group LLC	Tawnya Combe (test@goperiscope.com)
9000002049	Periscope Holdings, Inc.	Brian Utley (charris@periscopeholdings.com)

OK

Upon selecting the **Apply Bid Amendment** button on the bottom of the Summary tab all of the vendors you originally notified about the solicitation, as well as any other vendors that have acknowledged the Bid will be notified. The **Vendor Notification Result** screen will appear, listing the vendors that were emailed regarding the amendment, what time they were emailed and what email address was used.



Unlike the current eMaryland Marketplace, applying an amendment does NOT automatically withdraw previously submitted electronic responses. Instead, the system emails the vendors and notifies them that they must acknowledge the amendment and that if they do not, it may impact whether they can be awarded. Vendor responses are flagged if the vendor did not acknowledge one or more amendments.

Upon clicking the **Acknowledge Amendment(s)** button, the vendor is shown a message that they must make sure any previously submitted responses meet the current solicitation parameters.

Step 8 – Opening Solicitation Responses

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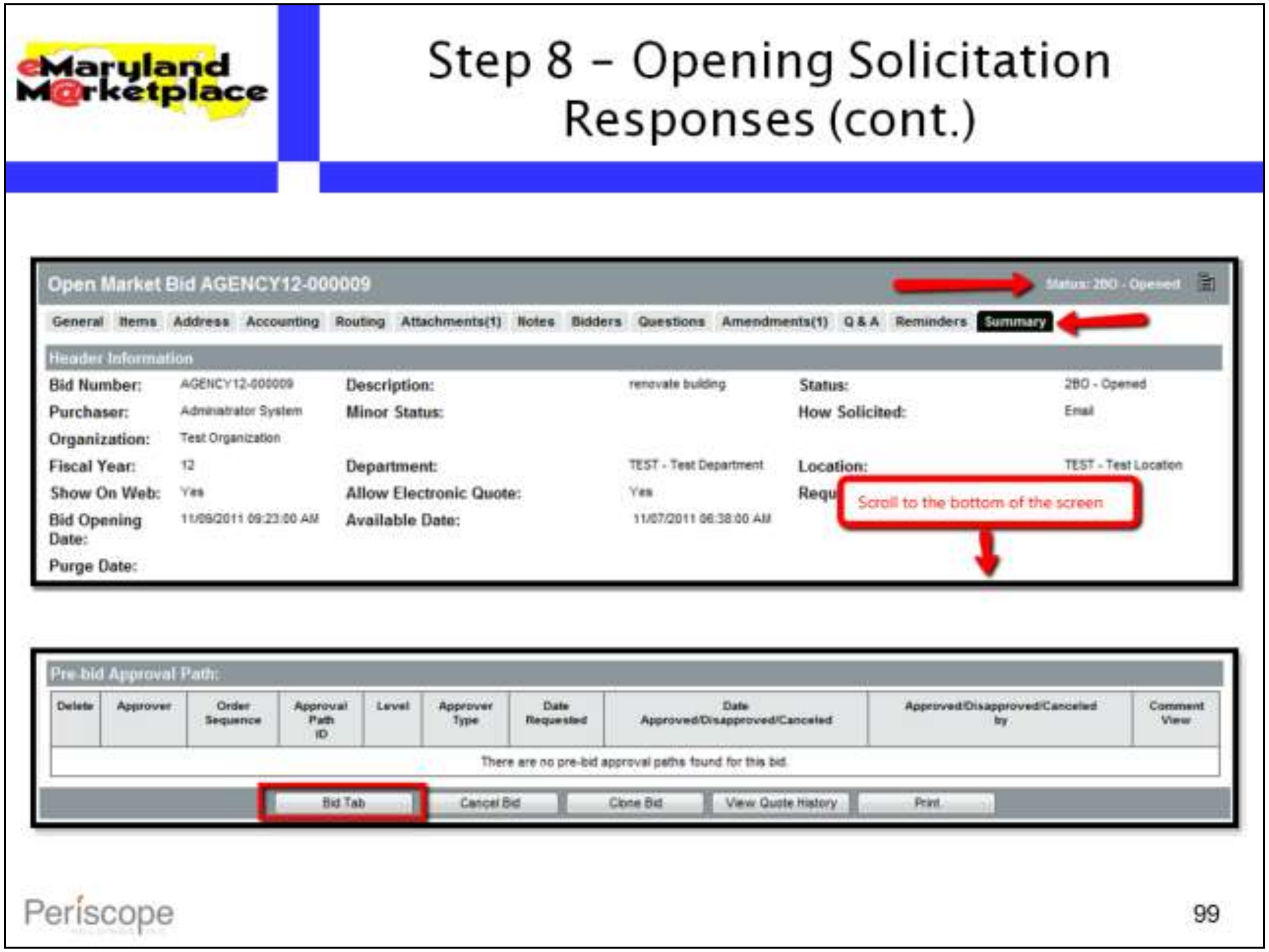
Once the Bid Opening Date/Time (due date) has been reached, your Bid will once again be accessible via the Bids tab on your Home screen within the **Ready to Open** sub-tab. If electronic responses were allowed and have been received, an **Open Bid** link will appear in the **Open Quotes** column next to the Bid. Click this link to begin your review of the responses.

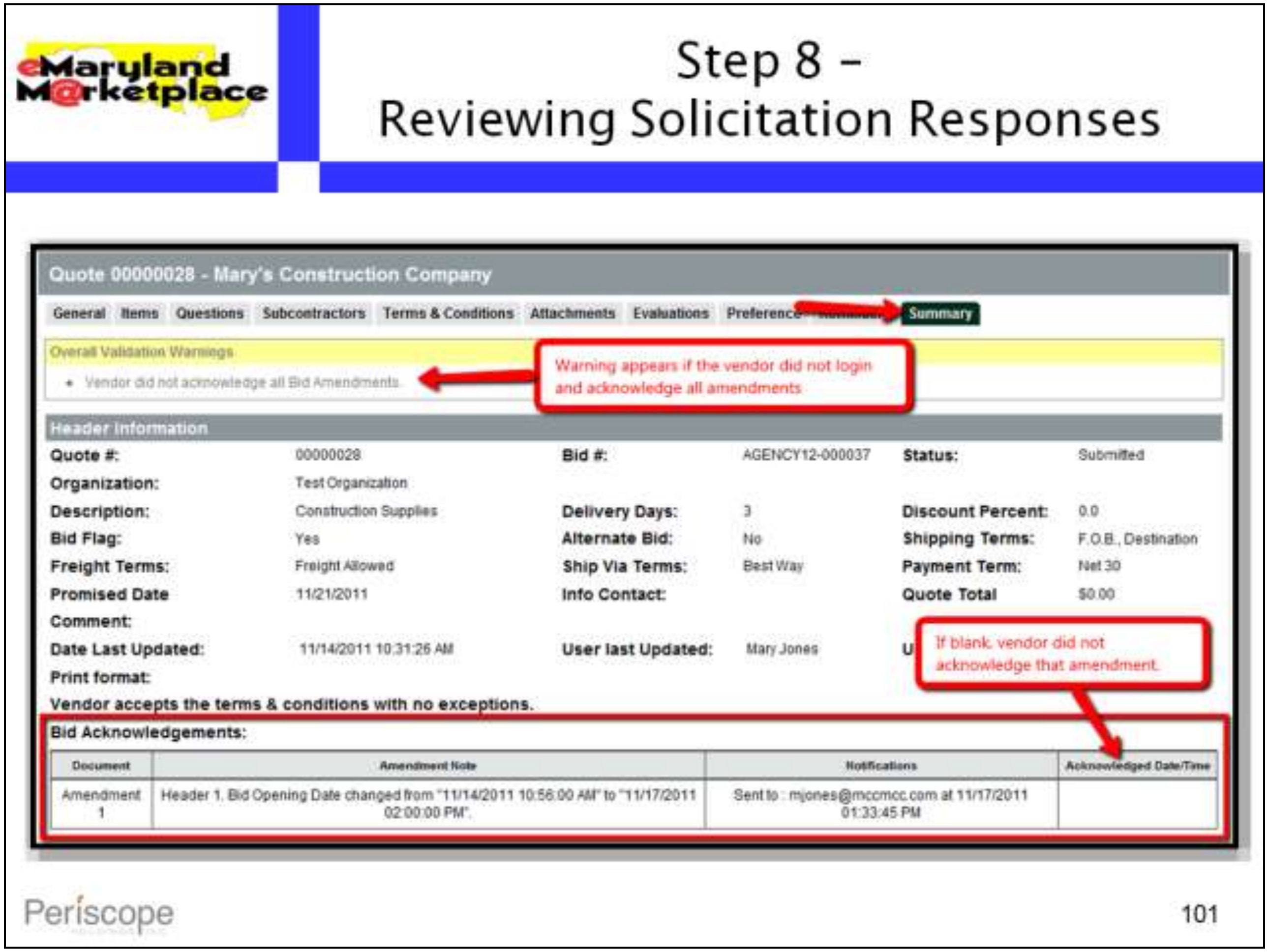
If no electronic responses have been received or were disallowed a **Create new Quote** link will appear in this column, allowing you enter responses you may have received offline. **NOTE: A response must be entered into the system in order to award it. If electronic responses were disallowed, you must submit at least a price quote for each vendor that will be awarded. Once you are ready to make your award, return here and click <u>Create new Quote</u> to enter price quotes on behalf of vendors. See the <u>Vendor Step</u> for instructions on creating a Quote.**



Once you Bid has been “Opened,” the Summary tab of the Bid document will appear. Note the status has been updated to “Opened.” From the bottom of this screen, you can access the Bid Tabulation (Bid Tab) document and the Quote History for the Bid. From the Bid Tab, you can view the submitted Quotes and begin your evaluation and award process. The Quote History screen just allows you to view the submitted Quotes.

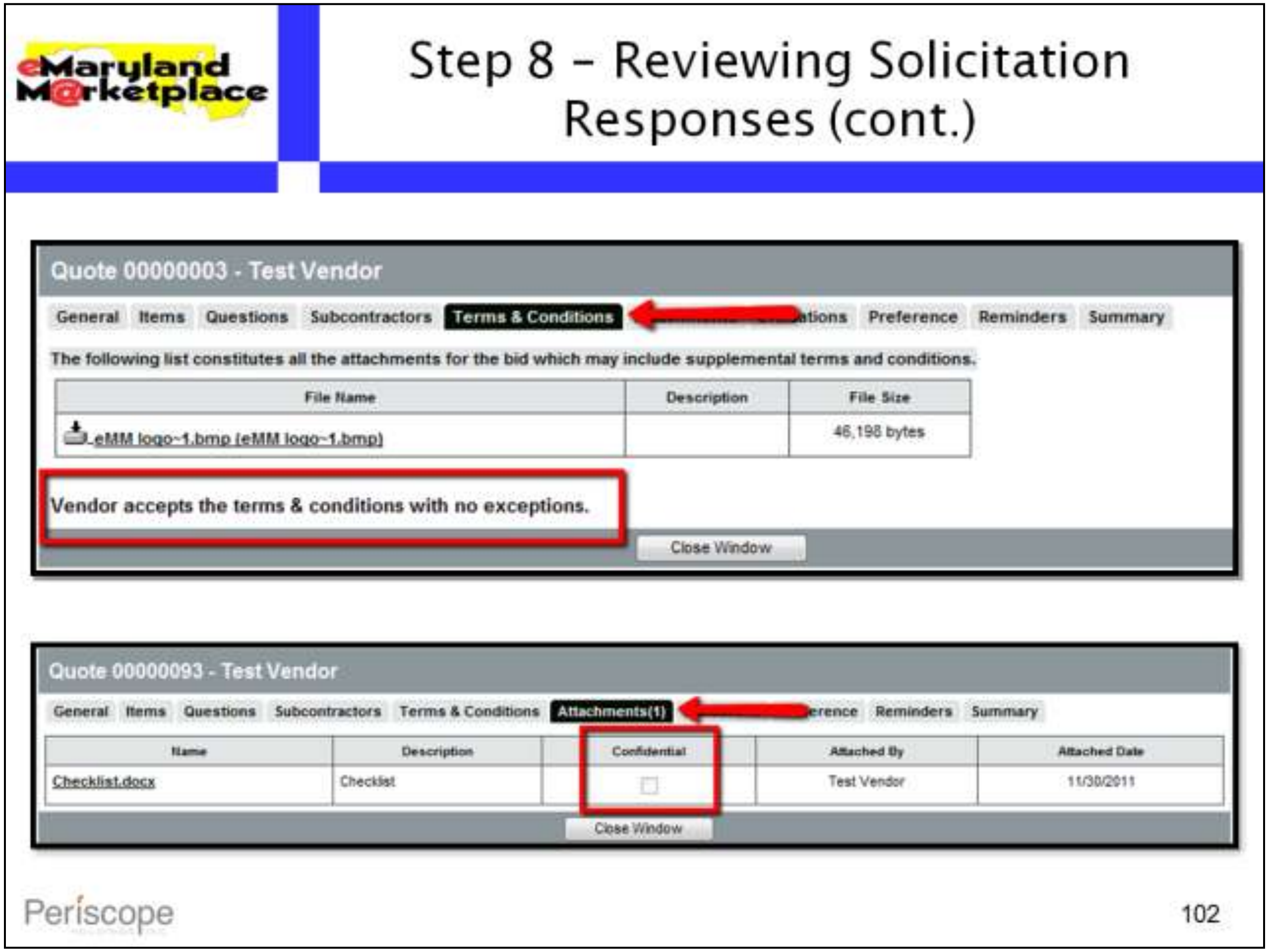
The Bid Tab, like all documents within ProcureAZ, is completed by working through a series of tabs, then reviewing all of the information you've entered on the Summary tab before submitting the document. The tabs on the Bid Tab enable you to compare Quotes, both in their entirety and specific elements, request revisions to Quotes, conduct an evaluation, attach files, and recommend award.

The first tab on the Bid Tab is the Quotes tab, which displays all of the Quotes that were received in response to the Bid. If you request a revision to a Quote, and one is submitted, the revised Quote will take the place of the original in this list. Click on the link in the **Quote #** column to open a pop-up window displaying that specific Quote to begin your review.



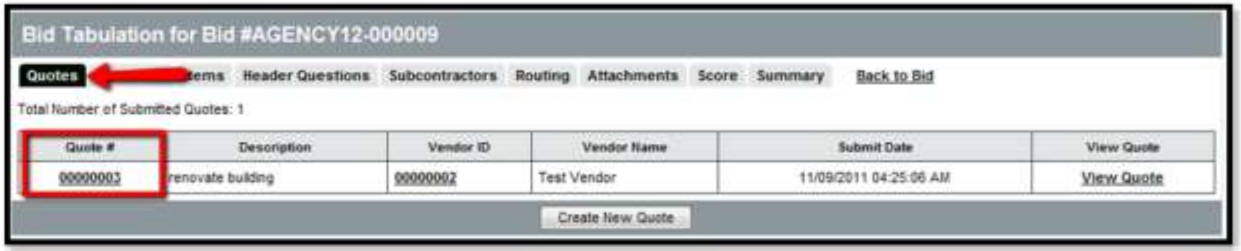
The first thing to view on each vendor's Quote is whether they acknowledged viewing every amendment applied to the Bid. On the Summary tab of Quotes, the **Bid Acknowledgements** field displays when the vendor acknowledged each amendment. A yellow validation warning will appear on the top of the Summary tab if the vendor did not acknowledge all amendments.

This warning does not drive any system functions and is intended solely to provide you with information regarding the Quote.



The other primary information to review on a vendor's Quote document is their attachments and their response to the Terms & Conditions. Other screens of the Bid Tab allow you to view and compare every vendor's quoted pricing by item, as well as their answers to the questions you posed on the Bid, a vendor's attachments and Terms & Conditions response can only be viewed by looking at their Quote document.

Step 8 – Complete



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Step 8 is complete once you have reviewed all of the Quote responses submitted by vendors. For solicitations conducted offline, it is complete once you have entered a Quote for each vendor that will be awarded.

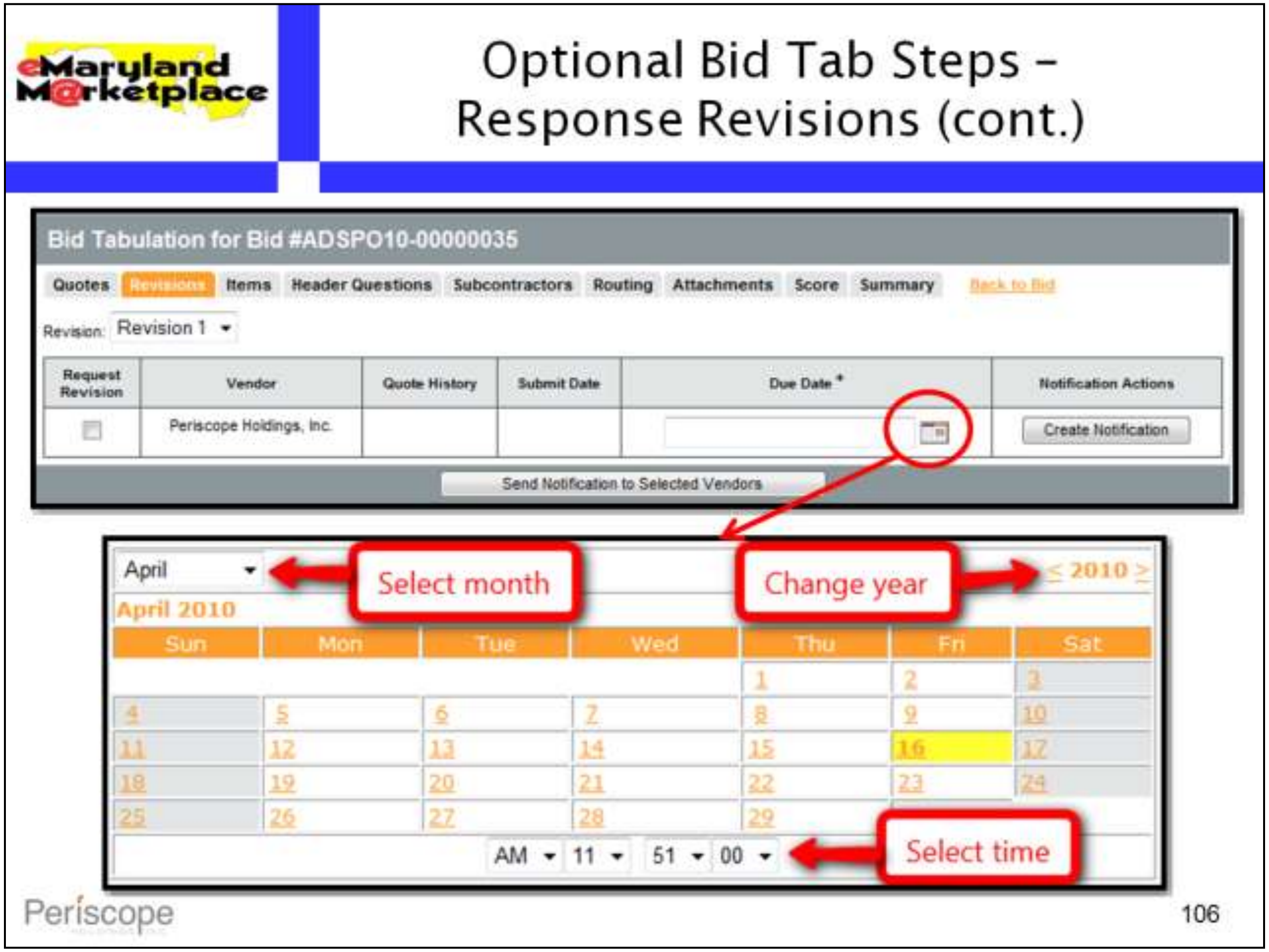
You can now proceed with the Optional Bid Tab Steps or Step 9 – recommending award(s) for approval.

Optional Bid Tab Steps

Response revisions, questions & attachments

You can request clarifications, revisions and Best and Final Offers (BAFOs) via the Revisions tab of the Bid Tab. Requesting a proposal revision is done by choosing a particular Quote and utilizing a system email to notify the vendor that created it that a revision is requested. A copy is then made of that Quote utilizing the same number with "-RX" appended to the end, where "X" is the number of revisions that have been requested for that Quote. This new copy of the Quote is made editable to the vendor until you close the revision process.

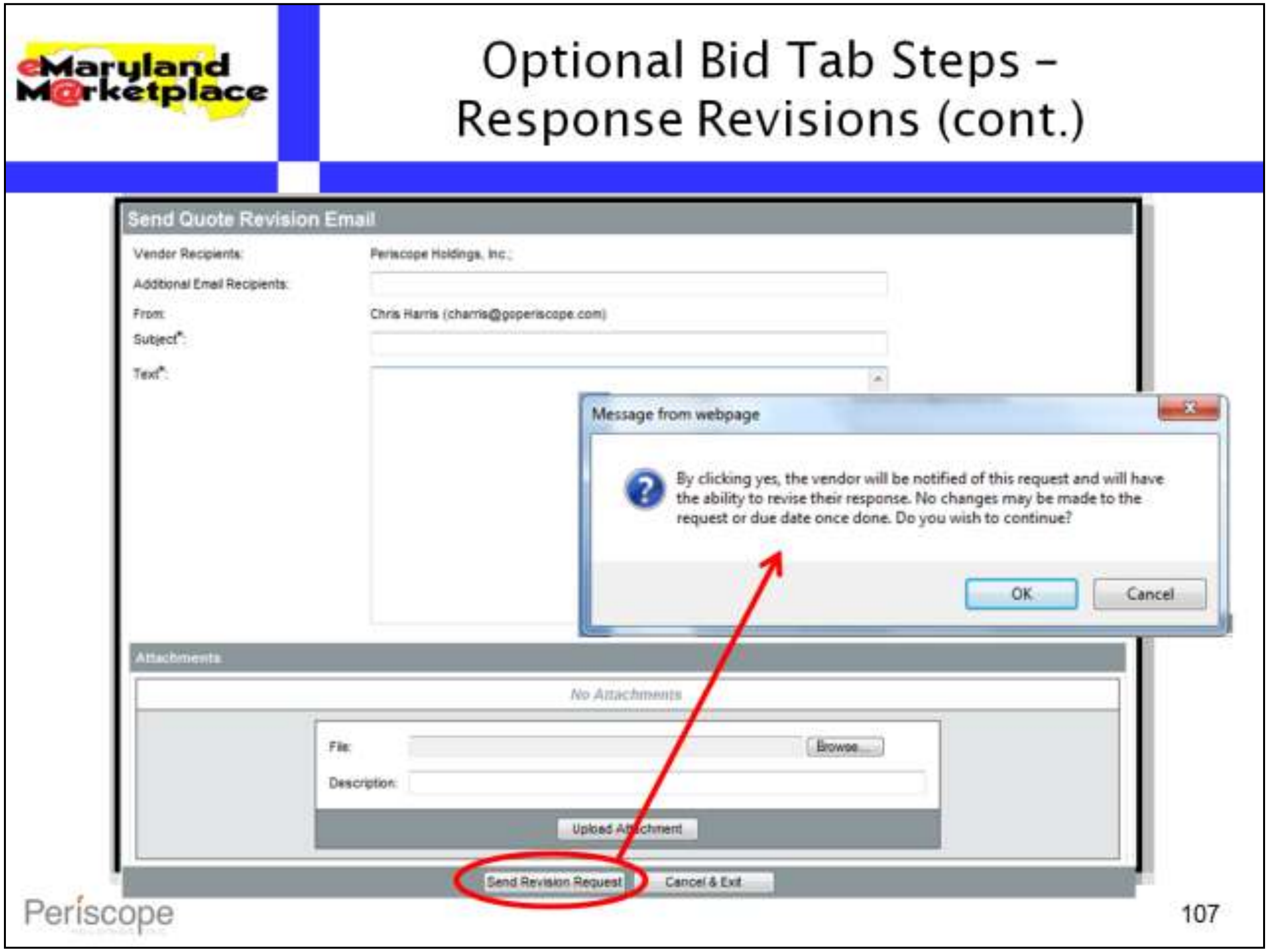
While the revision process remains open, you will be prohibited from recommending award and the vendor can submit and withdraw their Quote as needed. They are also able to acknowledge any amendments that were applied to the Bid prior to the Bid Opening Date.



To request a revision, first you'll need to decide which vendors you'd like to request a revision from and to determine if you would like to send multiple vendors the same revision request email, or if you will need to personalize the request email for individual vendors.

To send the same request to multiple vendors, pick a **Due Date** for each revision by clicking the calendar icon, then select the check box in the **Request Revision** column for each vendor to receive the request email and click the **Send Notification to Selected Vendors** button on the bottom of the screen. To send a revision request to one vendor, pick the **Due Date** for that vendor's revision, then click the **Create Notification** button in the **Notification Actions** column next to the vendor you'd like to request a revision from.

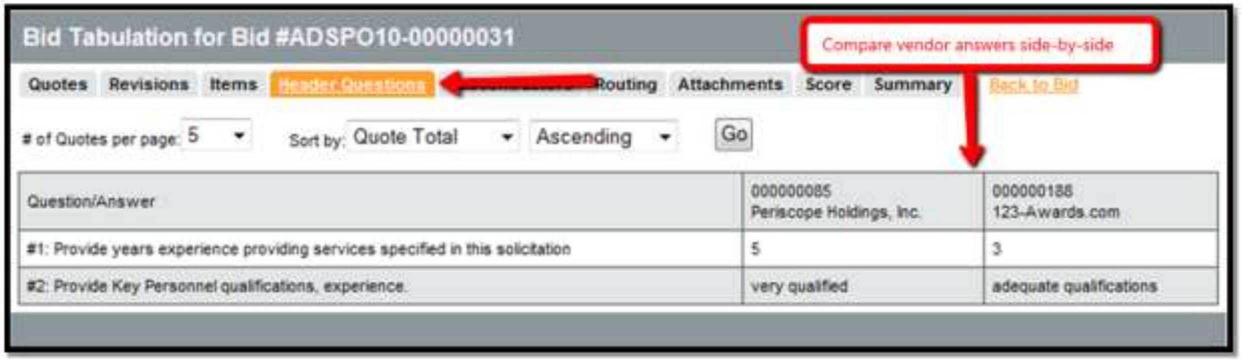
Note that the date selected in the **Due Date** column does not effect when you are able to cutoff the revision process and view a vendor's submitted revision. At any point you can close the revision process and either start again or continue with the evaluation and award process.



Next, the **Send Quote Revision Email** screen will display enabling you to develop the email message that will be sent requesting the proposal revision(s), including adding **Additional Email Recipients**, a **Subject**, **Text** (body), and **Attachments**. Once complete, click the **Send Revision Request** button along the bottom of the screen. A pop-up message will display confirming your intent to make vendors' Quotes editable and to send the email.

Note that the **Text** field does not support standard formatting, so it is recommended that you limit the text in this field and include any instructions in attached documents. Also note that this email will not appear in your email's Sent folder, so if you need a copy for your records, include your own email in the **Additional Email Recipients** field.

Optional Bid Tab Steps – Comparing Vendor Answers



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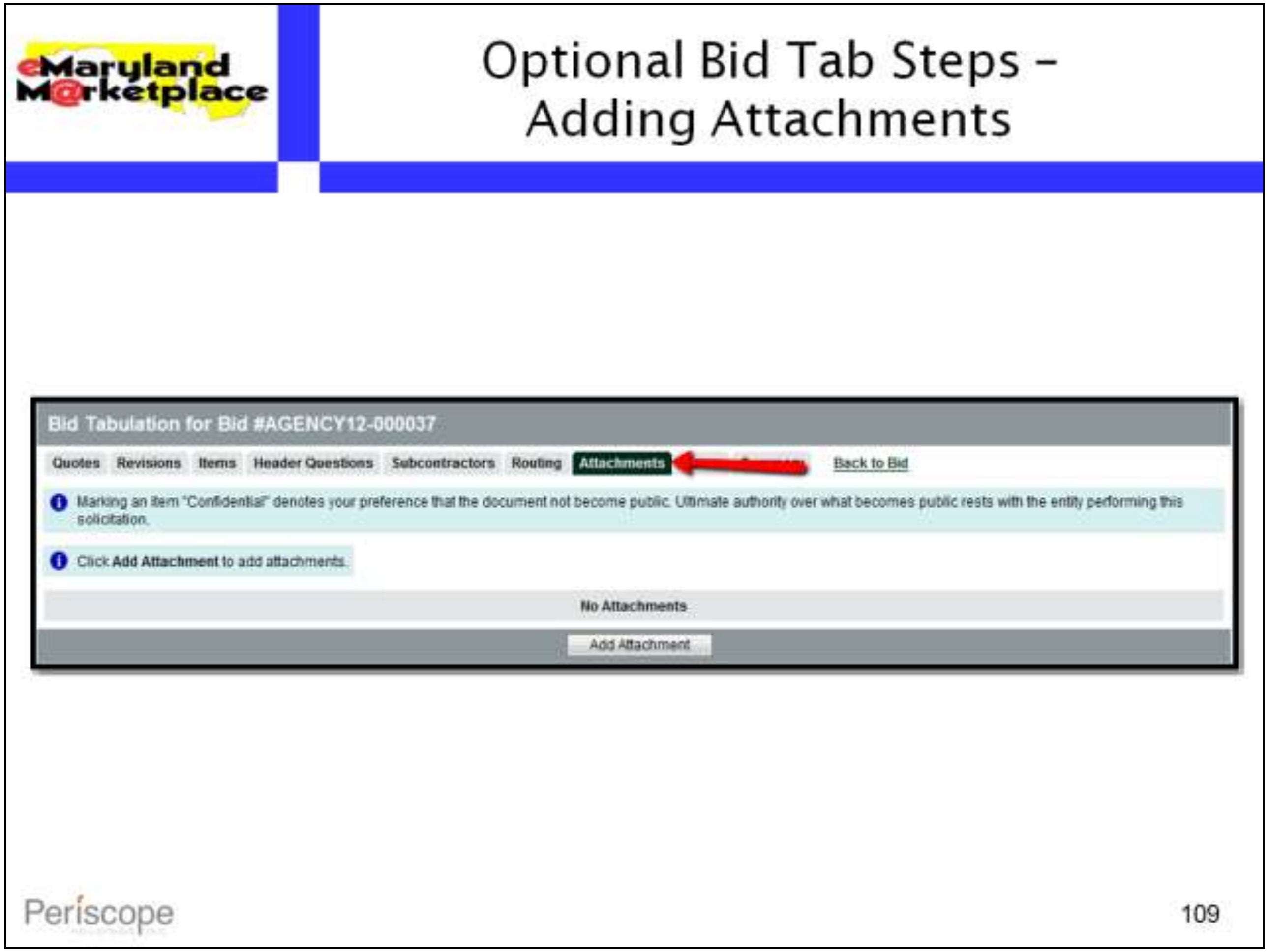
The Header Questions tab displays a list of all the header-level questions you entered via the Questions tab on the Bid and provides for a side-by-side comparison of the responding vendors' answers.



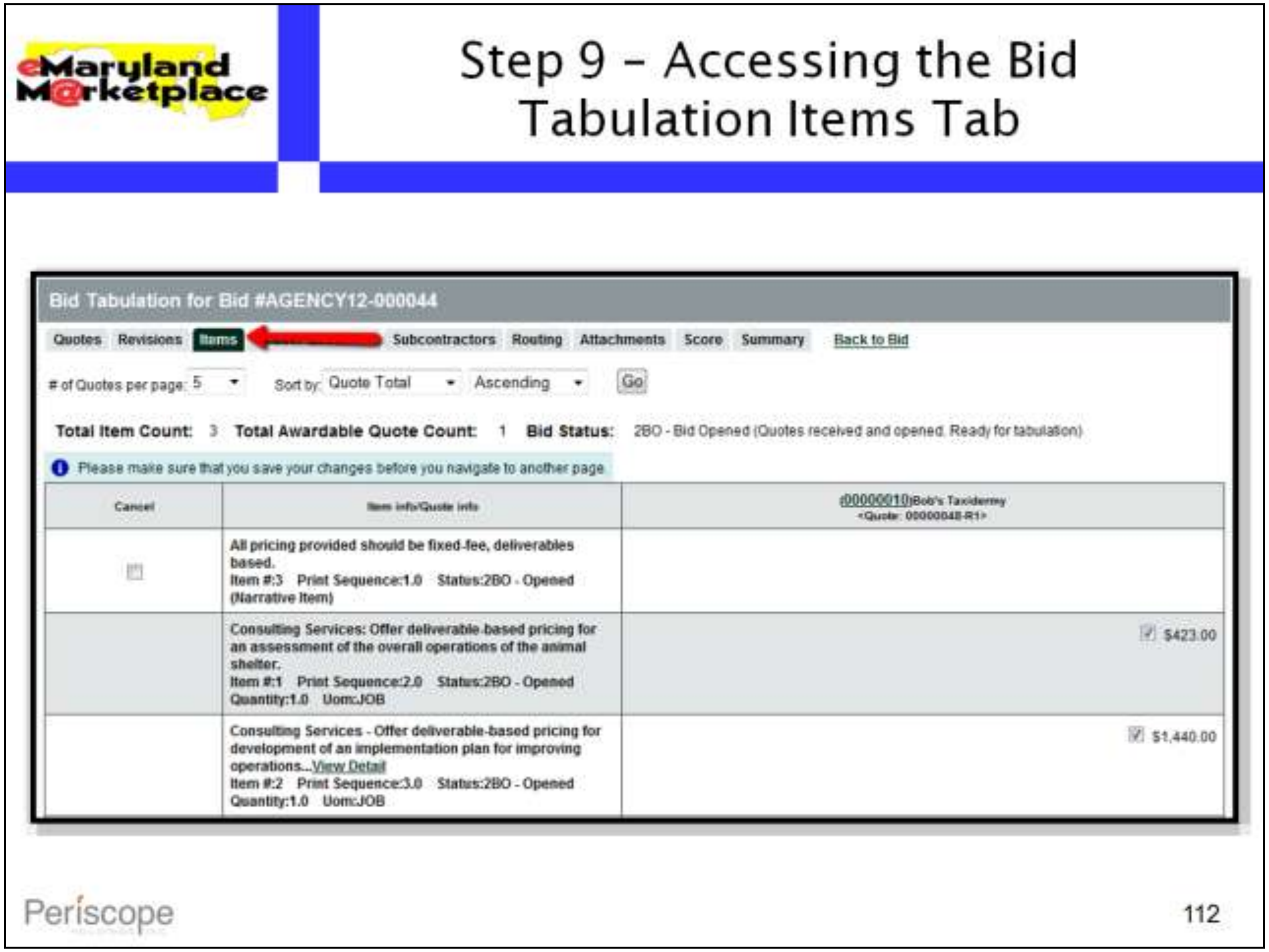
The evaluation process will continue to be conducted offline, however you can attach documentation regarding the evaluation via the Attachments tab on the Bid Tab. The Attachments tab here works identically to the Attachments tab on the Bid. Click **Add Attachments** to find the files to attach to the Bid Tab.

Step 9

Recommending award(s) for approval

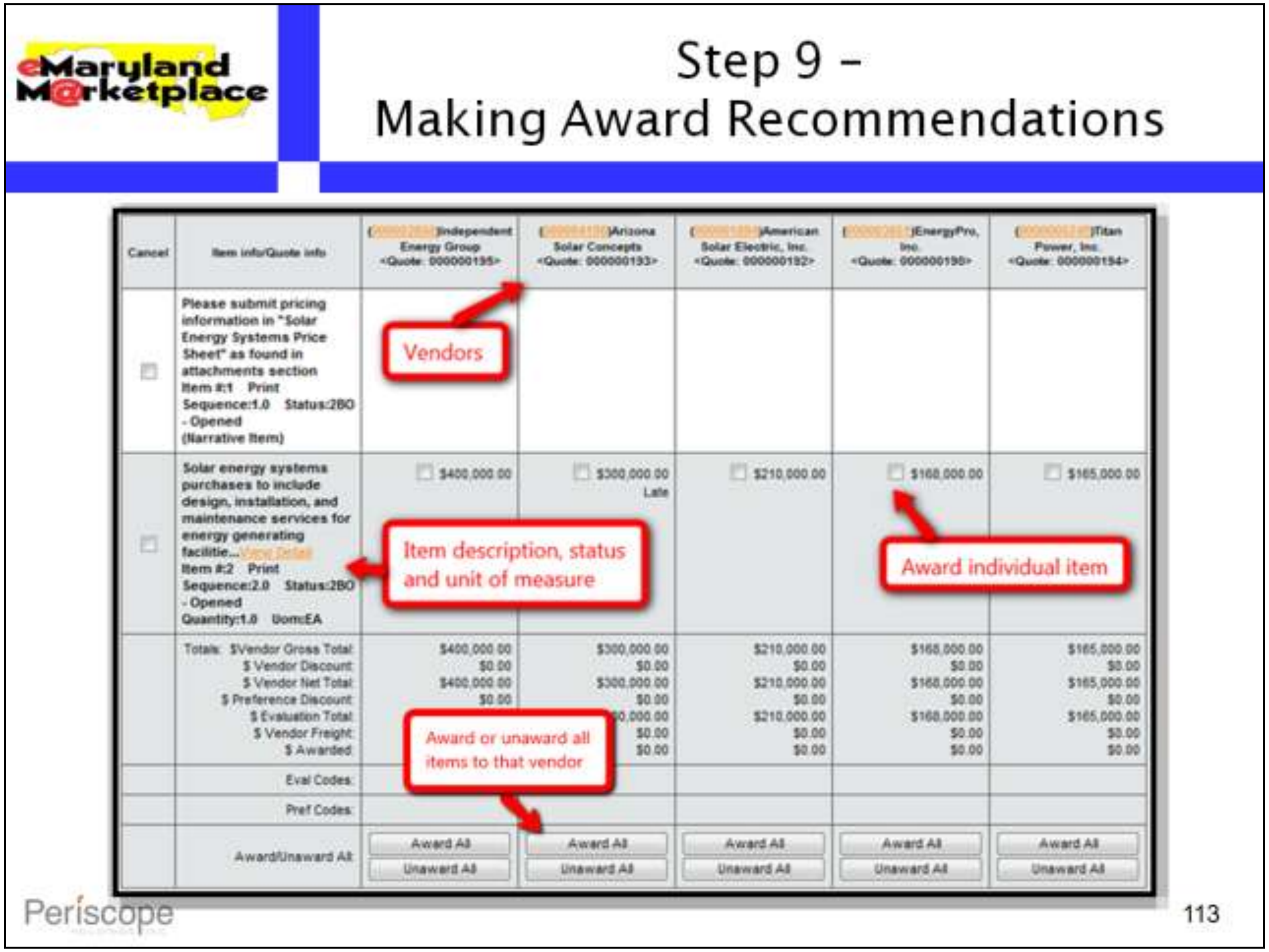
Step 9 – Checklist

- [ ] Access Bid Tabulation Items tab
- [ ] Make award recommendations
- [ ] Submit Bid Tabulation for approval



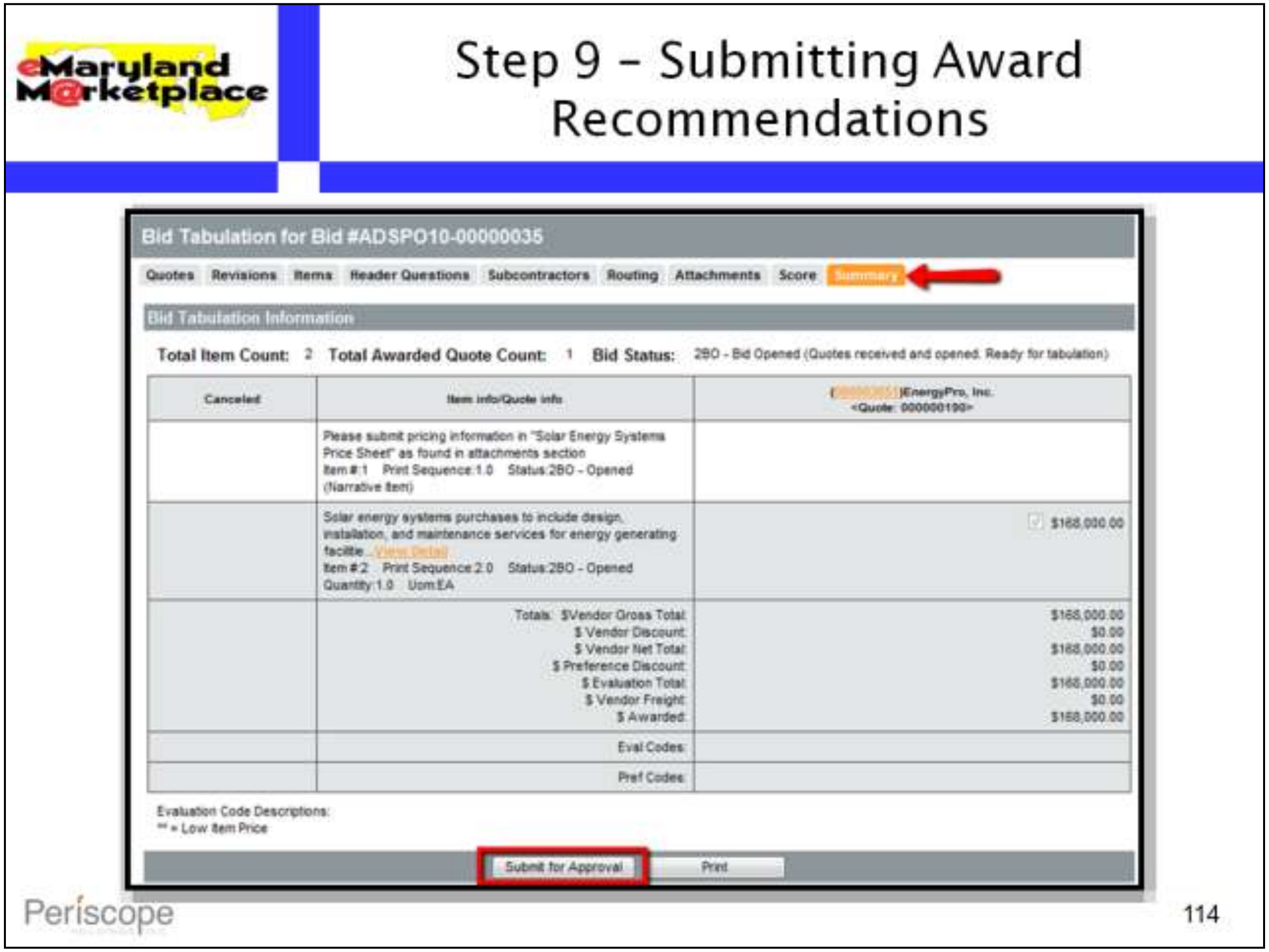
Once you are ready to award your solicitation, navigate to the Items tab on the Bid Tab. You can award each item to a single vendor, to multiple vendors, or you can cancel items and award them to no one. You can also do a partial award by not awarding an item or items to any vendor, which allows you to return to the Bid Tab later to create another award.

Note that the Bid document will remain in "Opened" status until all items on the Bid have been either awarded or cancelled. This means that the Bid document, and all its associated documents, including the Bid Tab, Quotes and their attachments will not be visible to the public.



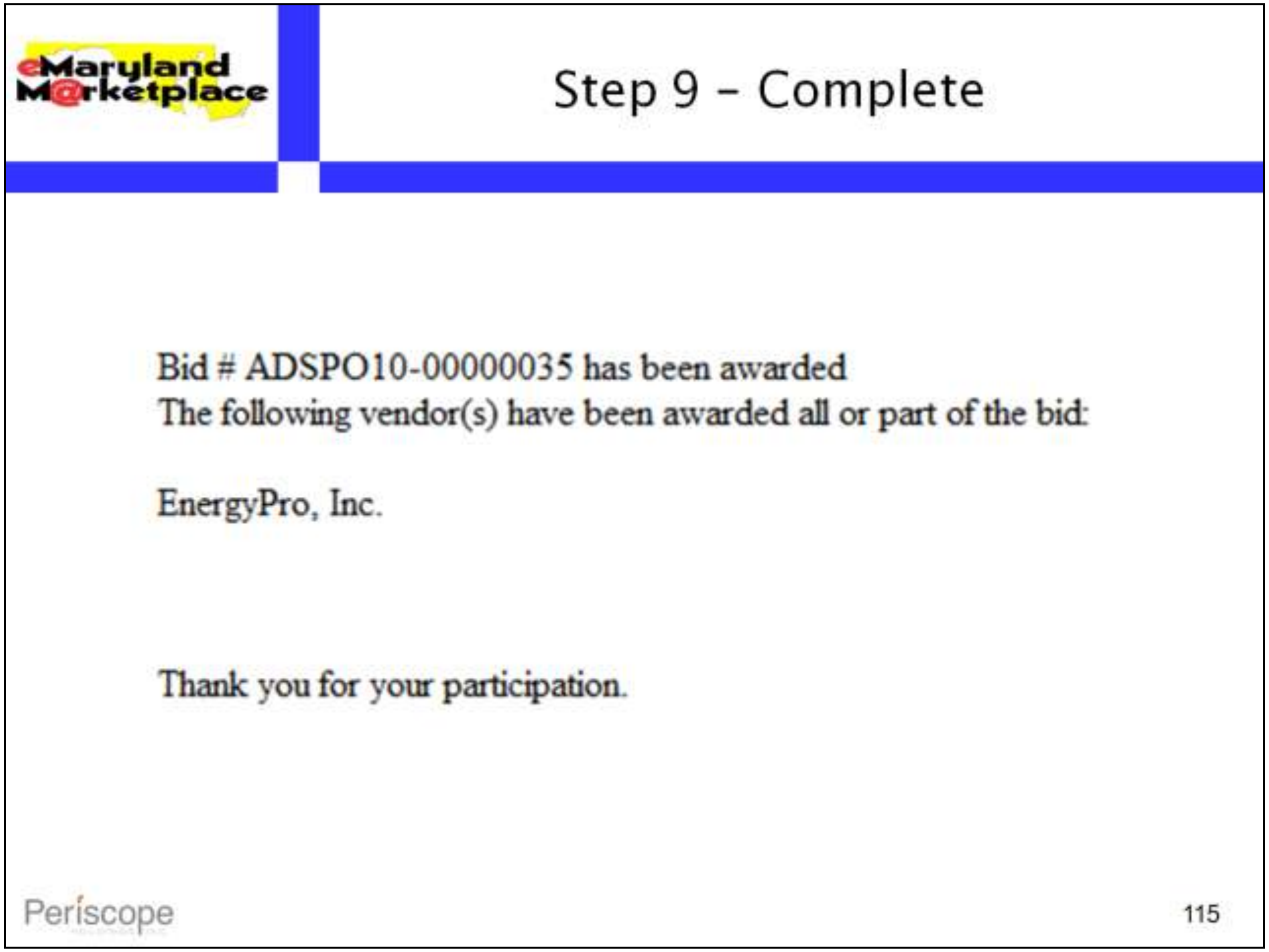
Awarding an item is done by clicking the checkbox next to the item within the column of the vendor to be awarded. To award all items to a vendor, select the **Award All** button within that vendor's column. Clicking the **Unaward All** button will uncheck all items you previously indicated you would like to award to that vendor.

Directly below the list of items, a row provides you with a tally of each vendor's quote totals, including any quoted discounts and freight chargers. Once you are finished awarding items, click **Save & Continue**.



The last step in the solicitation award process is to submit your award recommendation(s) for approval. On the Summary tab of the Bid Tab you can review your award recommendations before selecting **Submit for Approval**.

While the approvals necessary for your recommendation may be different, the approval process that follows is the same as when you submitted your Bid for approval to be published.



Step 9 is complete once award of the solicitation has been approved and all the vendors that submitted Quotes are notified via an email listing the awarded vendors.

You can now proceed with Step 10 – posting approved awards.

Step 10

Posting approved awards

Step 10 - Checklist

- ☐ Access Bid Tabulation Summary tab
- ☐ Post the approved award(s)

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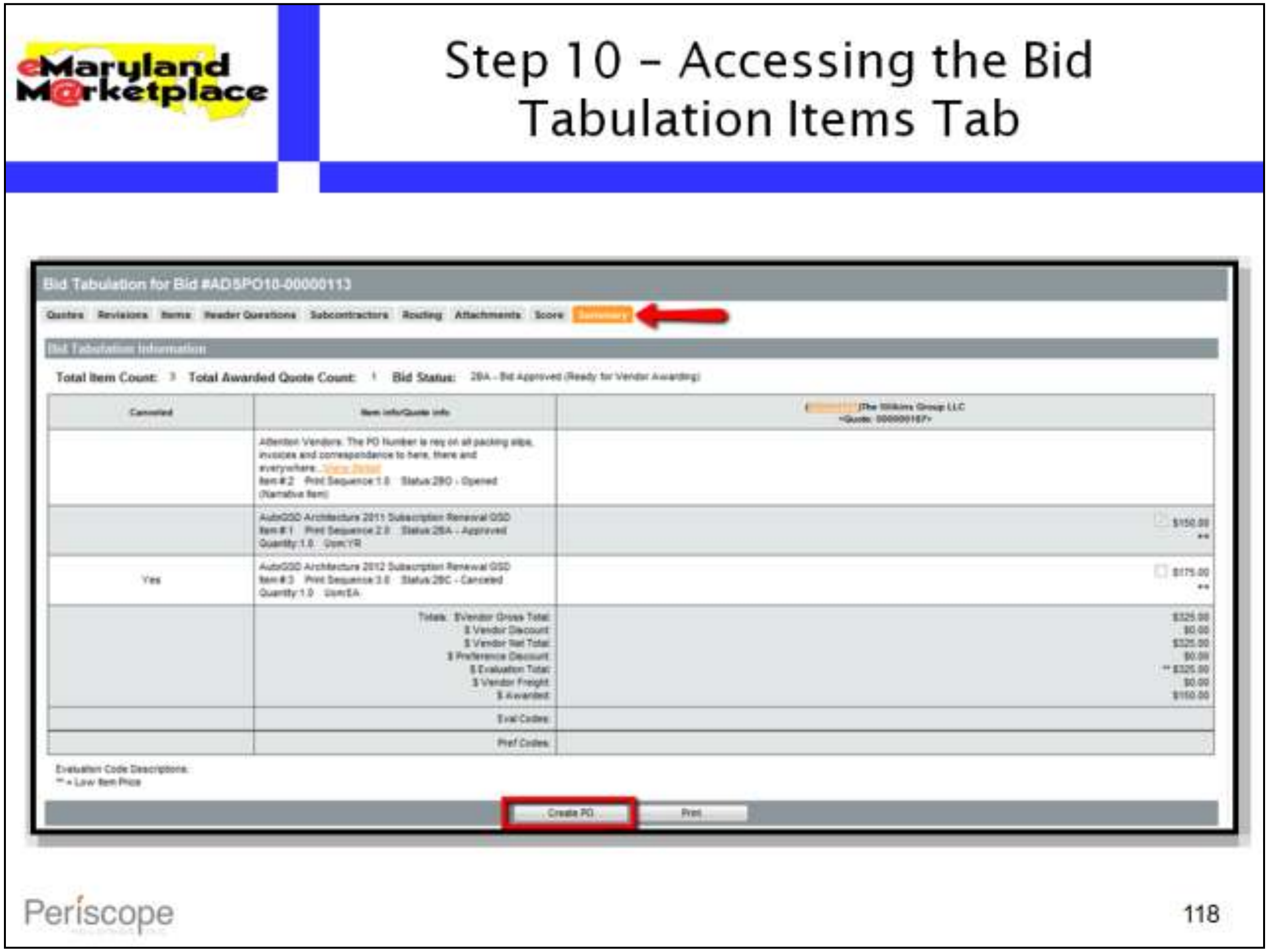
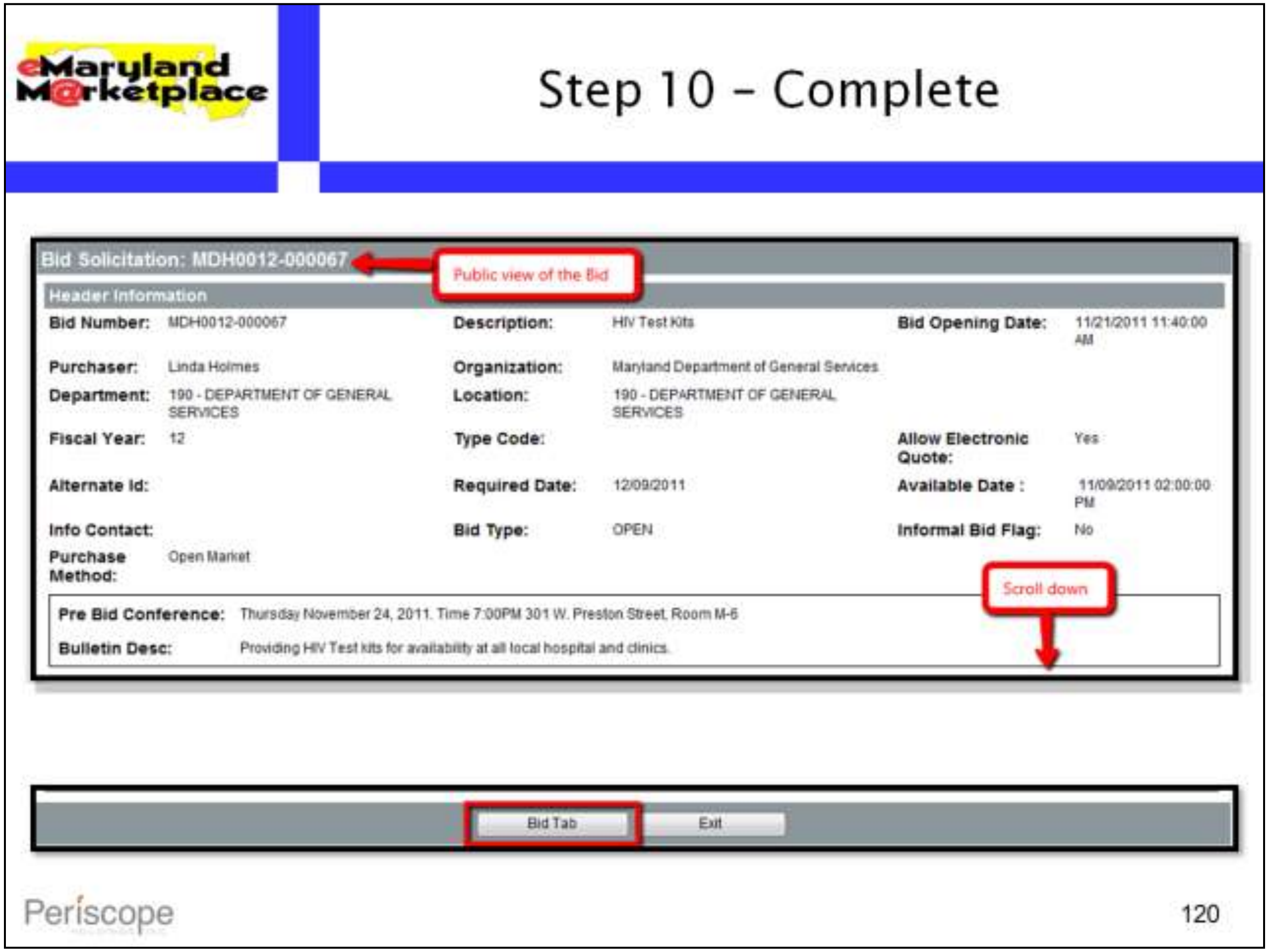


The final step in order to make your all of your solicitation public, including the Bid Tabulation, is to create a new PO from your Bid award. After your award recommendation has been approved, from the Summary tab of the Bid Tab you are able to create the resulting PO(s) by clicking the **Create PO** button on the bottom of the screen.

Note that all Bid items must be either awarded or cancelled in order for the Bid Tabulation to become public. If outstanding items remain, you can return to the Bid Tab at any time to either award or cancel them.

Clicking **Continue** on this screen finalizes the posting of the solicitation.



Step 10 is complete once the Bid Tabulation document has been published and is accessible from the eMaryland Marketplace Login screen.

You are now finished with the solicitation process!

eMaryland M@rketplace

Questions?

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